

Tel 317.232.7777
Fax 317.232.2342
www.in.gov/ihcda

HMIS CLIENTTRACK USER MANUAL 2.0

2015

*A guide to navigating ClientTrack, a web-based case management tool,
from entering basic client information to managing case loads and reports.*

TABLE OF CONTENTS

Table of Contents

Objectives.....	1
Contacts	2
Staff.....	2
HMIS Help Desk	2
Security Policies & Procedures.....	3
Privacy and Client Information Restrictions	3
ClientTrack Computers	3
Logging Into the System	4
Overview of ClientTrack Features	5
User Dashboard.....	5
Case Management Tools	6
Client Record	7
Household Members	9
Notifications	10
Entering Client Information and Managing Program Enrollments	11
Finding a Client	11
Program Enrollment	13
Adding a New Client with Program Enrollment.....	13
Definitions of Basic Client Information Requirements	14
Adding Household Members	15
Program Enrollment.....	16
HMIS Universal Data Assessment.....	17
Definitions of Universal Data Requirements.....	17
Veteran Assessment.....	18
HMIS Barriers Assessment	19
Domestic Violence Assessment	19
Financial Assessment.....	20
Definitions of Sources of Income.....	20
Definitions of Non-Cash Benefits	21
Adult Education Assessment	22

TABLE OF CONTENTS

HMIS Universal Data Assessment for Child	22
HMIS Barriers Assessment for Child	23
Child Education Assessment	23
Completing the Intake Workflow	24
Pausing a Workflow	24
Unique Program Requirements at Entry	24
SSVF	25
PATH	26
HOPWA	27
RHY	28
Adding Services	31
Quick Services	32
Case Notes	32
Update/Annual Assessment	34
HMIS Universal Data Assessment	35
HMIS Barriers Assessment	36
Domestic Violence Assessment	36
Financial Assessment	37
Adult Education Assessment	38
HMIS Universal Data Assessment for Child	38
HMIS Barriers Assessment for Child	39
Child Education Assessment	39
Completing the Update/Annual Assessment Workflow	39
Program Discharge	40
Enrollment Exit	40
HMIS Universal Data at Exit	41
HMIS Barriers Assessment at Exit	41
Financial Assessment at Exit	42
Definitions of Sources of Income	42
Definitions of Non-Cash Benefits	43
Adult Education Assessment	44
Exit for Child	44
HMIS Universal Data at Exit for Child	45

TABLE OF CONTENTS

HMIS Barriers Assessment at Exit for Child	46
Child Education Assessment at Exit.....	46
Completing Exit Workflow	47
Unique Program Requirements at Exit.....	47
PATH.....	48
HOPWA.....	49
RHY	50
Managing Providers	51
Basic Reports	54
Service Summary.....	54
Annual Performance Report (APR)	55
Finding Missing Data	56
Completing or Editing Missing Data	57
Consolidated Annual Performance and Evaluation Report (CAPER).....	57

CLIENTTRACK USER MANUAL

Objectives

Thank you for using ClientTrack as your Homeless Management Information System (HMIS). HMIS is an electronic data collection system that stores longitudinal client-level information about persons who access a variety of services for homeless prevention and/or rapid re-housing services. HMIS is a valuable resource from the participating homeless assistance and homeless prevention programs in a Continuum of Care (CoC). Aggregate data can be used to understand the size, characteristics and needs of the population at the local, state and national levels. HMIS enables information about client needs, goals and service outcomes.

The content in this user manual will provide information on all of the basic features of ClientTrack and detailed guidance on your day to day data entry, as well as helpful case management tools to optimize your services and time. We believe you will find this web-based case management system easy to use and essential in sharing your impact.

In this manual you will find the following information:

- **Contacts**
 - Staff List and Contact Information
 - HMIS Help Desk Information
- **Review Security Policies and Procedures**
 - Implied Consent Policy
 - Computer Storage
 - User Name and Password
- **Overview of ClientTrack Features**
 - User Dashboard
 - Case Management Tools
 - Client Record
 - Household Members
- **Entering Client Information and Managing Program Enrollments**
 - Intake Workflow
 - Services
 - Case Notes
 - Update/Annual Assessment
 - Exit Workflow
 - Managing Providers
- **Basic Reports**
 - Service Summary
 - Annual Performance Review (APR)
 - CAPER

CLIENTTRACK USER MANUAL

Contacts

STAFF

Jill Robertson

HMIS/ClientTrack Manager
Indiana Housing and Community Development Authority
jrobertson@ihcda.in.gov
317.234.7572

Lori Wood

HMIS/ClientTrack Master Trainer
Indiana Housing and Community Development Authority
lwood1@ihcda.in.gov
317.234.6975

Lynn Morrow

Community Service HMIS Assistant
Indiana Housing and Community Development Authority
lymorrow@ihcda.in.gov

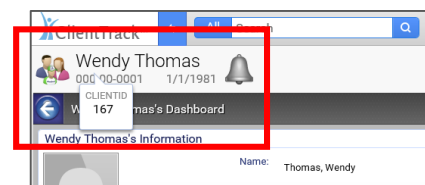
HMIS Help Desk

If you encounter any issues with ClientTrack at any time, please contact the help desk with the email address below. Please do not send any identifying information for clients when emailing the help desk. There is a unique client ID number assigned to each client record in the system and you can find this number by hovering over the client name at the top of the client record. **Please use the client ID number when emailing the help desk if applicable.**

HMIS Help Desk: HMISHelpDesk@ihcdaonline.com

CLIENTTRACK ACCESS

You can access HMIS with the following link:



HMIS BALANCE OF STATE CLIENTTRACK

[HTTPS://IHCDAONLINE.COM/INDIANAUW/](https://ihcdaonline.com/indianaauw/)

CLIENTTRACK USER MANUAL

Security Policies & Procedures

Personal protected information (PPI) is considered any information that could lead to individual identification. Agencies participating in HMIS should have procedures in place for the secure storage and disposal of hardcopy and electronic data generated from ClientTrack or created for entry into ClientTrack. PPI should be stored in locked drawers/file cabinets and hardcopy data should be shredded before disposal. Electronic PPI including data contained on disks, CD's, jump drives, computer hard drives and/or other media should be reformatted before disposal.

PRIVACY AND CLIENT INFORMATION RESTRICTIONS

The Notice of Privacy Practices including the purpose for data collection should be posted in a public area and in an office where an intake professional meets with clients. The full privacy policy notice should be posted on the web sites of agencies, as well as made available to clients who request it. The document is called "Intake Posting" and "Agency Websites" and can be downloaded from the IHCD website at <http://www.in.gov/myihcda/2444.htm>.

A signed client consent form is no longer required. A client who presents to your agency for services and provides information is giving implied consent to enter and share certain data in ClientTrack. Data collection and data sharing are topics that should be discussed with the client at the time of intake. Some program enrollments (and information related to those enrollments) are restricted and only the enrolling organization (HOPWA, PATH) will have access to those records. ***No person is to be refused services regardless of their participation in ClientTrack. You can find Indiana's Balance of State (BOS) security plan on the partner website, as well as other helpful forms and resources:*** <http://www.in.gov/myihcda/hmis.htm>.

CLIENTTRACK COMPUTERS

All computers used to access ClientTrack should be situated in secure locations. ClientTrack computers in publicly accessible areas should be staffed at all times and not viewable by other individuals. All computers should be password protected, and the password you use to log onto your computer should NOT be the same password as your ClientTrack password, but rather a password to prevent access to the computer itself.

ClientTrack usernames and passwords should NOT be shared with other users. Users should not keep username/password information in a public location (i.e., sticky notes on monitors or filed under HMIS or Password in a Rolodex). ClientTrack security policies require the use of strict passwords. Passwords must have:

- At least one number
- At least one non-letter, non-numeric character
- Between 8 and 12 characters
- At least one capital letter

CLIENTTRACK USER MANUAL

New passwords will be required upon first login. **Accounts are automatically deactivated after 30 days of inactivity for security purposes.** You will be required to change your password every 90 days for security purposes. If you need assistance with your username and password contact the Help Desk by emailing HMISHelpDesk@ihcdaonline.com and someone will assist you.

LOGGING INTO THE SYSTEM

ClientTrack is a web-based application and you will need to use an internet browser to access it. ClientTrack works with Microsoft Internet Explorer, Google Chrome, Mobile Safari and Mozilla's Firefox.

Open your web browser and go to <https://ihcdaonline.com/IndianaUW/>. Enter your assigned User Name and Password and click "Sign In." **Remember, sharing your user name and password is not permitted. Passwords are case sensitive and pop-up blockers must be turned off to access the application. You may need to change your settings to allow for pop-ups from this site.**

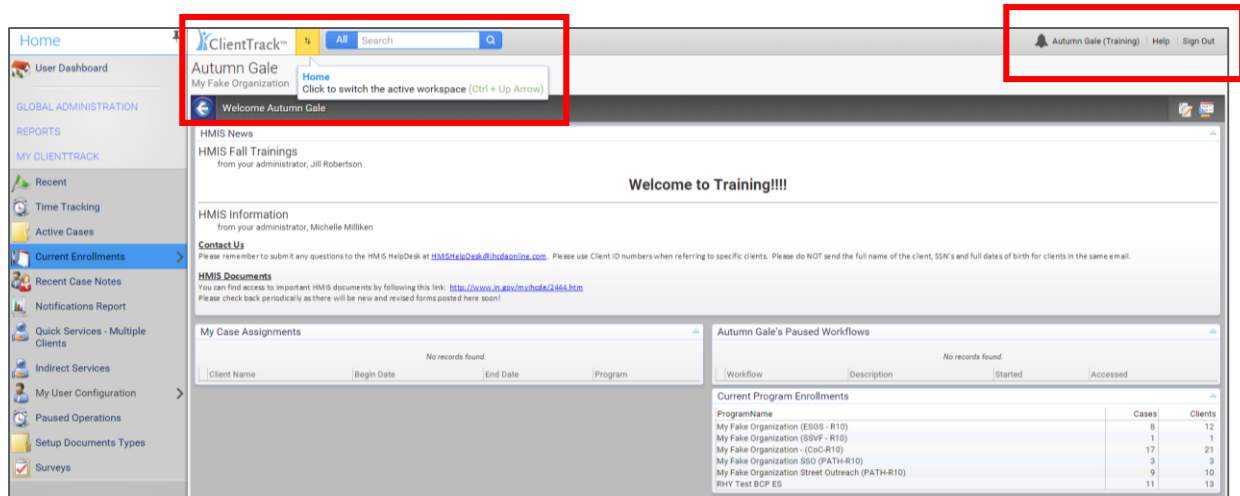
Your organization may participate in one of two or both workgroups called **"2014 IHCDA HMIS: HMIS Programs"** or **"2014 IHCDA HMIS: Street Outreach."** Be sure to select the appropriate workgroup when logging in as it makes a difference for which programs you can manage. Also make sure your organization and location is selected appropriately. Click on **"Use These Settings"** to continue. You will be required to **"Accept"** the Terms of Agreement when you log into the system for the first time.

CLIENTTRACK USER MANUAL

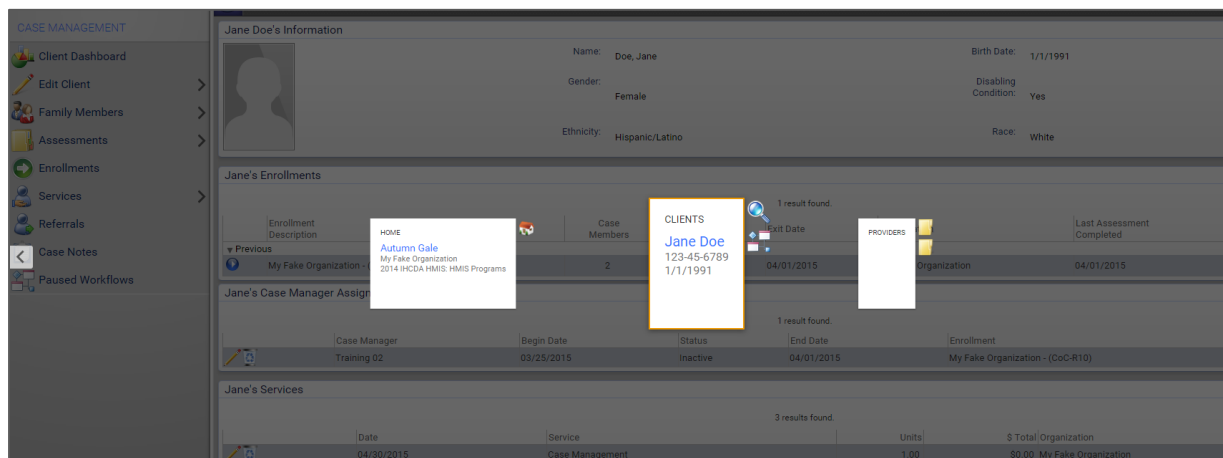
Overview of ClientTrack Features

USER DASHBOARD

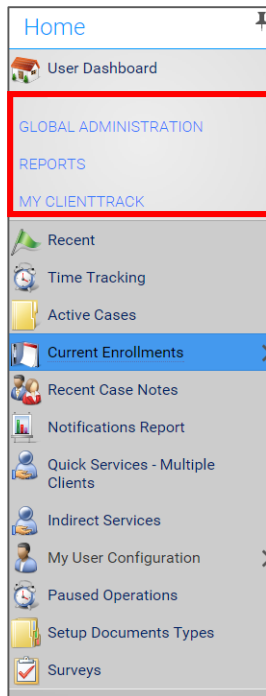
You will be directed to your **User Dashboard** on the “**Home**” screen and notified of any important “**HMIS News**” items IHCDa wants to communicate (i.e. upcoming trainings, changes etc.) – this is the first screen you come to after logging in.



You can access all three screens, “**Home**,” “**Clients**” and “**Providers**,” which provide you different features for managing your cases by clicking on the link with white arrows beside the ClientTrack logo outlined with the red box above. After clicking on that icon, you will see the three boxes appear labeled, “**Home**,” “**Clients**” and “**Providers**” and you can toggle between them by clicking on the appropriate box to take you to that section of ClientTrack as seen below.



CLIENTTRACK USER MANUAL



If you have access to more than one workgroup, you can use the link with your name in the upper right-hand corner of the screen (outlined with the red box on page 5) to toggle between the workgroups without logging out. The **“Sign Out”** link is in this same location as well. **Please be sure to “Sign Out” any time you need to leave the database to ensure security of client data.**

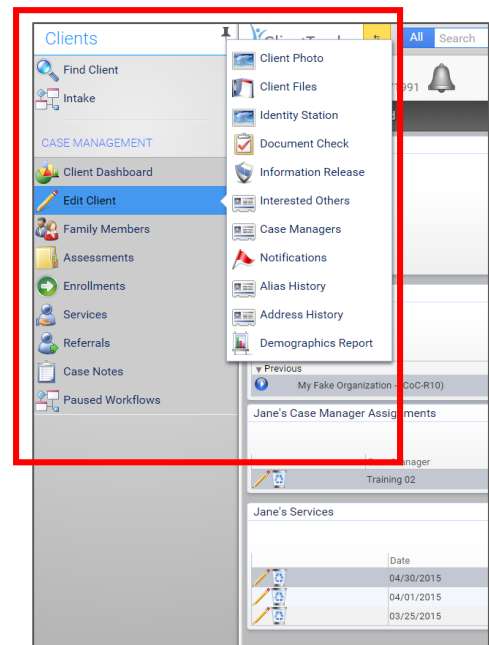
On the **“Home”** screen there is also a list of **Menu Items** that give you easy access to your current case assignments, case notes and more under **“My ClientTrack.”** You can also change your password with the **“Change My Password”** link by clicking on **“My User Configuration”** in the list of Menu Items. All of these tools are designed to maximize your time and grant you easy access to your client records.

You will also find the **“Reports”** section on the **“Home”** screen. To run a variety of reports, which will be detailed later in this manual, click on **“Reports”** found above **“My ClientTrack”** in the upper left-hand corner of the screen to access reports.

CASE MANAGEMENT TOOLS

On the **“Clients”** screen you will find the most recent client record you were on as well as a list of **Case Management Tools** on the left-hand side of the client record. The following information outlines features and tools found on the client record, and to access these features, hover on the link in the case management section and a list of tools will appear as seen in the red box:

- **Find Client** – To search for a client in the system by first and last name, date of birth, social security number, client ID number, etc.
- **Intake** – To enroll a client in your program.
- **Case Management Tools: (Frequently Used)**
 - **Client Dashboard** – The overview of the client record as seen on the next page.
 - **Edit Client** – To edit basic client information like address, date of birth, social security number, disabling condition, veteran status, etc. There are more helpful tools under “Edit Client” that are available for you to use depending on your agency’s needs and requirements.
 - **Family Members** – To review household members.



CLIENTTRACK USER MANUAL

- **Assessments** – To review assessments and please note that all required assessments for your program are captured in the Intake Workflow. This is where you can access the **Self-Sufficiency Matrix**.
- **Enrollments** – To view the list of current and past enrollments the client has accessed.
- **Services** – To add, edit and view the list of services the client has received.
- **Referrals** – To add and manage referrals provided to a client.
- **Case Notes** – To create, edit and view case notes.
- **Paused Workflows** – To resume a workflow you previously paused.
- **Basic Client Information and Client ID Number** - Located at the top of the client record and includes the client's name, gender, date of birth, etc. The client ID number can be found by hovering over the client name at the very top of the client record (Client ID Number is required when communicating electronically about a client record, i.e., requesting assistance from the help desk).

CLIENT RECORD

The client record is broken up into sections with case management tools to help you easily find client information and manage program enrollments, services, case notes, and more.

1. At the very top of the client record, you will see the **client's basic information** and demographics as shown below. You can find the client ID number, which is automatically assigned to the record when created.

1. Basic Client Information and Demographics

Jane Doe
123-45-6789 1/1/1991

Jane Doe's Dashboard

Jane Doe's Information

Name: Doe, Jane Birth Date: 1/1/1991 Age: 24
Gender: Female Disabling Condition: Yes Veteran: No
Ethnicity: Hispanic/Latino Race:

2. Enrollment Information

Jane's Enrollments

Enrollment Description	Case Members	Enroll Date	Exit Date	Organization	Last Assessment Completed	Enroll ID	Exit ID
My Fake Organization - (CoC-R10)	2	03/25/2015	04/01/2015	My Fake Organization	04/01/2015	104	121

3. Case Manager Assignments

Jane's Case Manager Assignments

Case Manager	Begin Date	Status	End Date	Enrollment
Training 02	03/25/2015	Inactive	04/01/2015	My Fake Organization - (CoC-R10)

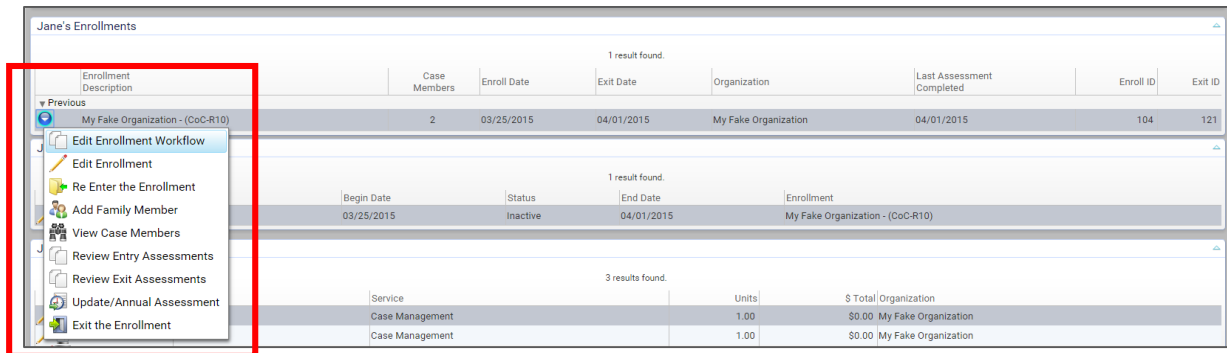
4. Services

Jane's Services

Date	Service	Units	\$ Total	Organization
04/30/2015	Case Management	1.00	\$0.00	My Fake Organization
04/01/2015	Case Management	1.00	\$0.00	My Fake Organization
03/25/2015	Case Management	1.00	\$0.00	My Fake Organization

CLIENTTRACK USER MANUAL

2. In the center of the client record, you will see all of the client's past and present **program enrollments** as seen below.



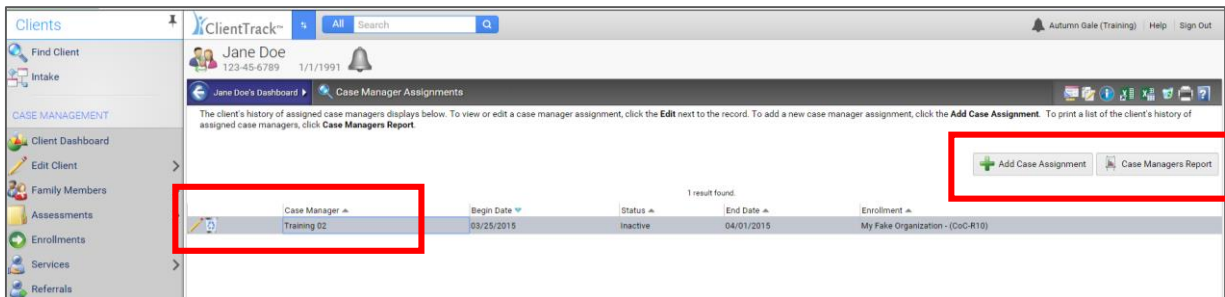
There is a blue play button or action wheel you can click on to easily manage your program enrollment. When you click on the blue play button, a drop down list will appear where you can:

- **Edit Enrollment** – Edit the enrollment date with this feature.
- **Re-enter the Enrollment** – Use this feature to re-enroll a client who was prematurely discharged or his/her enrollment status changed to continue services.
- **Add Family Member** – Use this feature if a new household member needs to be added to the household and enrolled after an enrollment has already been established, i.e., a new baby is born and needs to be enrolled with Mom. Make sure you're on the head of household's client record when adding a family member to the enrollment.
- **View Case Members** – View all case members associated with the specific program enrollment.
- **Review Entry/Exit Assessments** – You can review the assessments completed at entry and exit with this feature without going through the workflow. This is helpful in completing missing data that was not captured at those points in time.
- **Update/Annual Assessment** – Use the Update/Annual Assessment to conduct annual assessments or capture changes to a client's status since enrollment.
- **Exit the Enrollment** – To exit a client, select "Exit the Enrollment" and you will be prompted through the exit workflow for the client and all household members if applicable. If you need to only exit one household member, go to the specific household member's client record and conduct the exit workflow without exiting the household.

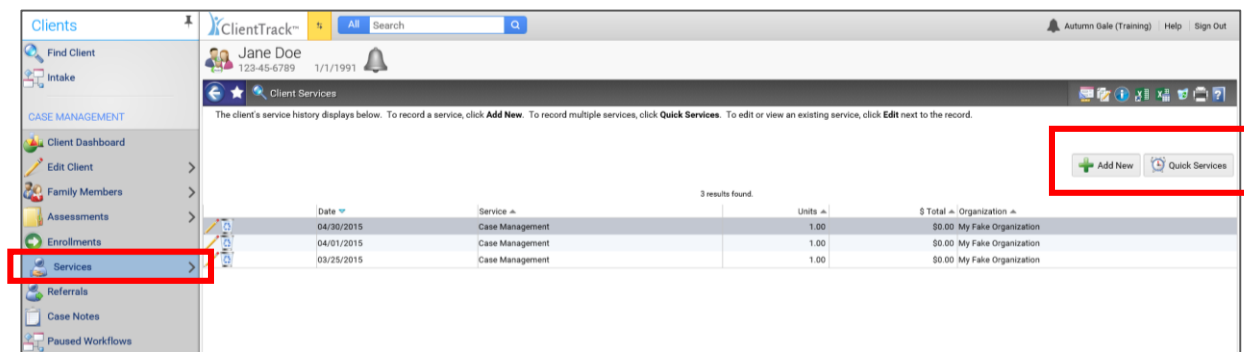
3. **Case Manager Assignments** are located below the enrollments section of the client record. You can manage case assignments here by clicking on the "**Jane's Case Manager Assignments**" as outlined on page 9 or clicking on the little notepad beside the case manager's name. Clicking on the **recycle bin** beside a case manager's name will delete the case manager from the client record.

CLIENTTRACK USER MANUAL

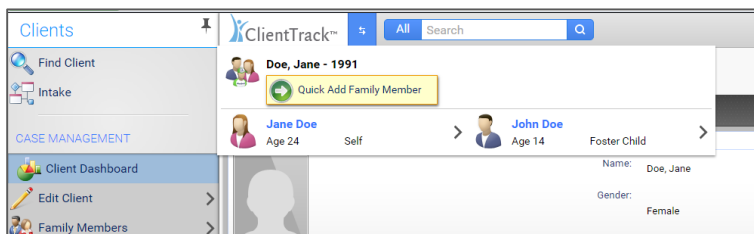
By clicking on the case manager assignments link, you will be taken to a screen where you can edit the status of a case manager for a specific program enrollment or add new case managers to the client record.



4. **Services** associated with a specific program enrollment will be listed at the bottom of the client record. You can manage your client services by clicking on “**Services**” in the list of case management tools on the left-hand side of the client record or by clicking “**Jane’s Services**” above the list of services on the client record. Documenting services is discussed in detail starting on page 31 of this manual.



HOUSEHOLD MEMBERS



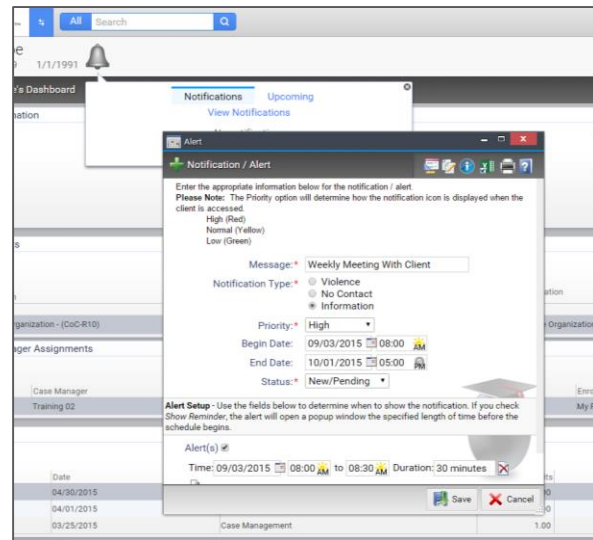
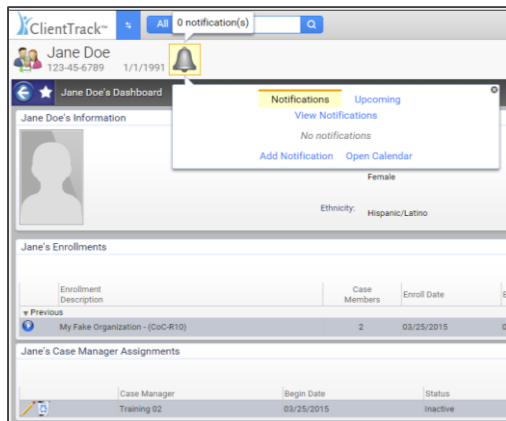
You can view household members and their client records by clicking on the **multi-colored family icon** at the top of the client record beside the client name. A window will appear with all of the current household members. You can click on the names

of the household members in the window to go directly to his/her client record. You can also use the “**Quick Add Family Member**” link in this window to add new household members. **Please note that you will be able to add household members during an Intake workflow as well.** You may also add a family member to an existing enrollment with the “**Add Family Member**” feature (described on page 8) listed when you click on the blue play button beside your program enrollment.

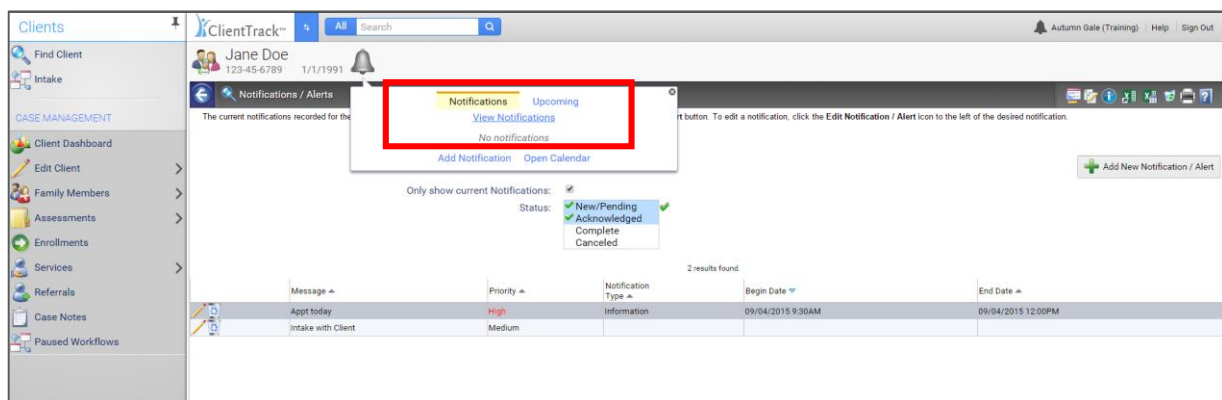
CLIENTTRACK USER MANUAL

NOTIFICATIONS

ClientTrack features a **"Notifications"** tool on the client record that allows you to set up alerts specific to the client, like reoccurring appointments, required documentation, client deadlines, etc. The Notifications tool is located beside the client's name at the top of the client record. To add a new notification, click on the bell and a new window will appear below it. Select **"Add New"** to add a new notification. A new window will open where you can set up the new notification as seen below.



After setting up the notification, you can review your notifications and calendar by clicking on the bell and selecting **"View Notifications"** as seen below.

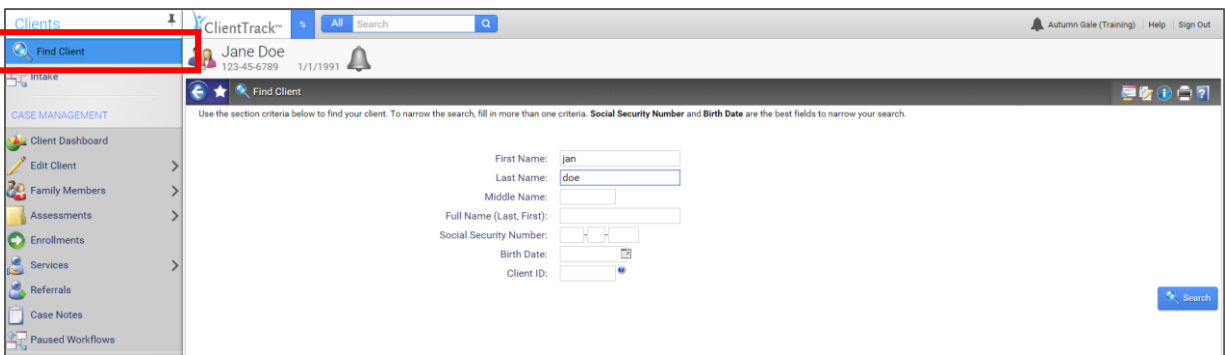
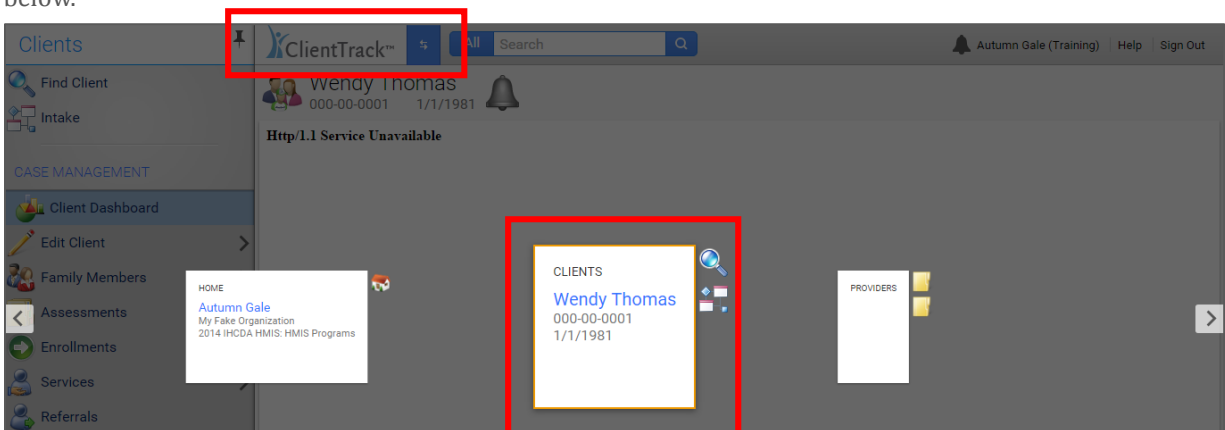


CLIENTTRACK USER MANUAL

Entering Client Information and Managing Program Enrollments

FINDING A CLIENT IN THE SYSTEM

Before entering a client into the system as a new client, you should always conduct a search for the client to see if there is an existing client record in the system. To search for a client, go to the “Clients” screen as seen below and click on “Find Client” in the upper left-hand corner of the screen as also outlined in red below.



It is imperative you do not enter a duplicate client record into the system in order to ensure the accuracy and overall quality of the data. To speed the search process and reduce the chance for input error, input as few characters as possible in the criteria fields. You may search for a client by entering the following:

- Letters of the client first/last name (use as few letters as possible of the first and last name to conduct a thorough search)
- Social Security Number
- Birth Date
- Client ID Number

CLIENTTRACK USER MANUAL

It is important to try different options for your search. **Again, it is best to ONLY enter the first few letters of the first/last name and not rely solely on a social security number or birth date, as those elements have a higher rate of missing or inaccurate data.** Another option for searching is to search different spellings of the client's name and remember to search for nicknames such as "Joe" in addition to "Joseph" or "Jen" in addition to "Jennifer."

If the client is already in the system, highlight the client name in the search results and click on the **Client Name** to select that record. The selected client's information will be displayed at the top of the screen and all information entered from this point forward while on the client's dashboard will be associated with the currently selected client.

IHCDA works to eliminate duplicate clients in ClientTrack. Please contact the HMIS Help Desk at HMISHelpdesk@ihcdaonline.com with clients who have multiple records in the system. When sending a notification of duplicates or any information regarding clients to the Help Desk, please **ONLY** send Client ID numbers. Client ID numbers are found by hovering on a client name at the top of the client's dashboard as outlined on page 2 of this manual.

The screenshot displays the ClientTrack web application interface. On the left-hand side, there is a vertical menu with various options. The 'Edit Client' option, located under the 'CASE MANAGEMENT' section, is highlighted with a red rectangular box. The main area of the screen shows a client's dashboard for a client named Wendy Thomas. The dashboard includes fields for personal information such as First Name, Last Name, Middle Name, and Suffix. It also features a section for demographic data, including Birth Date, Client Age, Date of Birth Quality, Ethnicity, Race, Gender, Pregnancy Status, Pregnancy Due Date, Disabling Condition, and Veteran Status. The 'Race' dropdown menu is currently open, showing options like American Indian or Alaska Native, Asian, Black or African American, Native Hawaiian or Other Pacific Islander, White (which is selected), and Client doesn't know. At the bottom right of the dashboard, there are 'Save' and 'Cancel' buttons.

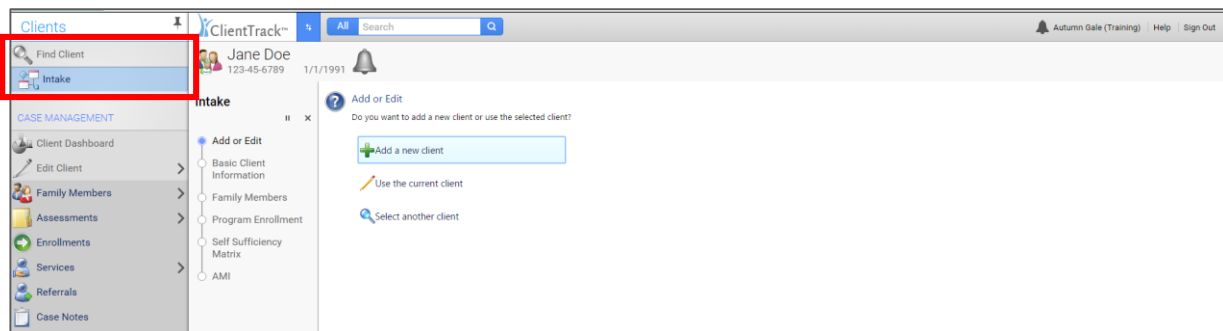
After selecting the client in the search list and going to the client's dashboard, if the client's basic information has changed, click on the **"Edit Client"** case management tool found on the left-hand side of the screen outlined in red above to make any necessary changes to the client demographic information (i.e., birth date, ethnicity, name change, etc). *****Please note that the "Save" button will save the changes made to the screen and leave you on the same page. The "Save & Close" button will save the changes you have made to the screen and move you to the next one.***

CLIENTTRACK USER MANUAL

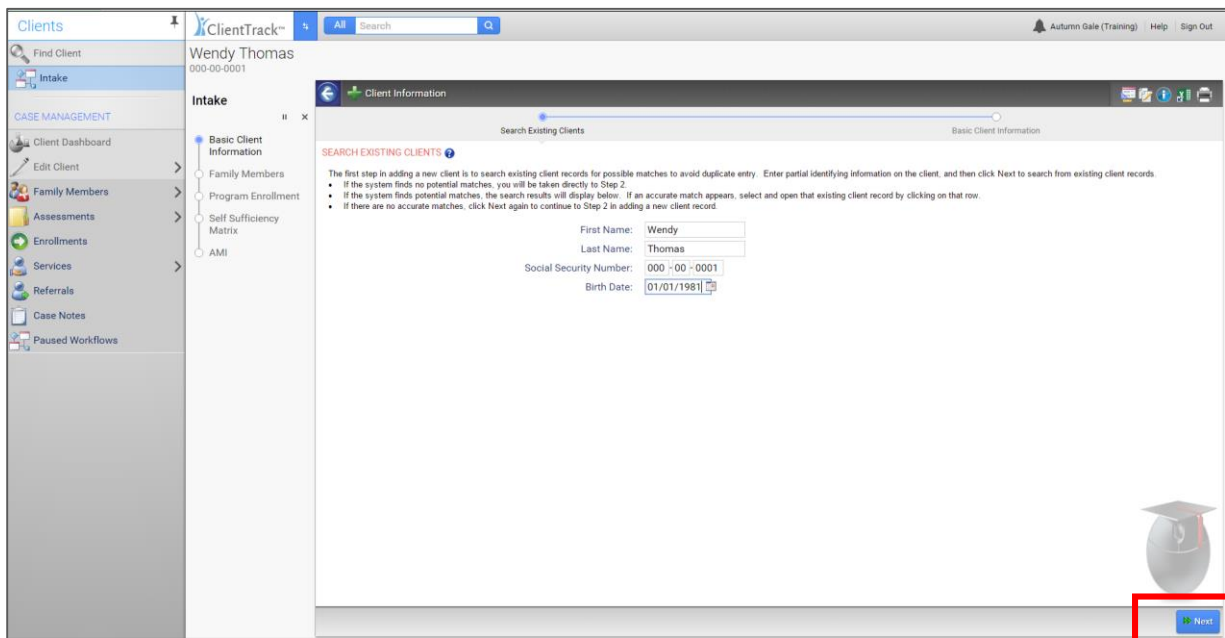
ADDING A NEW CLIENT WITH PROGRAM ENROLLMENT

ClientTrack utilizes a specific workflow to step you through the process of completing all required assessments at entry and discharge. The workflow is easy to use and it automatically prompts you for the necessary information.

After conducting a search for the client in the system to ensure an existing client record does not already exist, you can add a new client record by selecting **"Intake"** in the upper left-hand corner of the screen found under **"Find Client."** Then choose **"Add New Client"** when prompted as seen below.



Enter your client's first and last name and click **"Next."** If a duplicate client already exists and was not identified during the client lookup, **a warning in red letters** will be displayed. It is very important to review the displayed list. If the client is already in the system, click the client's name to select the existing client record. If the client you are entering is a new client, do not select a client in the displayed list, click **"Next"** to proceed with the intake process.



CLIENTTRACK USER MANUAL

Add the client's basic information including date of birth, social security number, demographics, disabling condition, Veteran status and address. Click **"Finish"** when the client's basic information is complete. **Please note that all of the data elements are self-declared by the client and not attributed by the case manager or data entry personnel. The option "Data Not Collected" indicates that the question was not asked of the client and will report as missing on reports. Please do not make up information or answer for the client.**

The screenshot displays the ClientTrack software interface. On the left is a sidebar with navigation options: Clients, Intake, CASE MANAGEMENT (Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Referrals, Case Notes, Paused Workflows). The main window shows the 'Client Information' form for 'Wendy Thomas' (000-00-0001, 1/1/1981). The form is divided into sections: 'Basic Client Information' (First Name: Wendy, Last Name: Thomas, Middle Name: , Name Quality: Full name reported, Social Security Number: 000-00-0001) and 'Basic Client Demographics' (Birth Date: 01/01/1981, Client Age: 34, Date of Birth Quality: Full DOB Reported, Ethnicity: Non-Hispanic/Latino, Race: White, Gender: Female, Pregnancy Status: Yes, Pregnancy Due Date: 11/22/2015, Disabling Condition: No, Veteran Status: Yes). At the bottom right, there are 'Previous' and 'Finish' buttons, with the 'Finish' button highlighted by a red rectangle.

Definitions of Basic Client Information Requirements

- **First Name** - Legal first name (do not add nicknames in "quotes" because those are not searchable elements).
- **Last Name** - Legal last name.
- **Social Security Number (SSN)** - If the client doesn't know or refuses to provide their SSN, **DO NOT** under any circumstance enter a fake social security number such as 123-45-6789 or 999-99-9999. Select the data quality option that best reflects the client's response.
- **Birth Date** - Month, day and year the client was born. Again, do not make up a birth date. Choose the appropriate data quality option that best reflects the client's response.
- **Ethnicity** - Hispanic/Latino origin includes individuals of Cuban, Mexican, Puerto Rican, South or Central American origin.
- **Race** - A person can identify with multiple races and this is a multi-select box that allows for multiple races to be checked at once. Click on all that apply.
- **Gender** - Select the gender with which the client identifies. If the client reports **"Female,"** you will be prompted for the client's **"Pregnancy Status"** and **"Due Date"** if applicable.

CLIENTTRACK USER MANUAL

Definitions of Basic Client Information Requirements Continued

- **Disabling Condition** – Select the appropriate response as reported by the client. Please note that if the client reports at least one barrier on the Barriers Assessment, then the disabling condition status should be “Yes.” You can update the disabling condition by clicking on the “**Edit Client**” link.
- **Veteran Status** – Select the appropriate response as reported by the client. If you select “Yes” for Veteran Status here, you will be prompted in the workflow to complete the Veterans Assessment.
- **Family** – Do NOT enter anything in the “Family” field. ClientTrack will create a household/family account.
- **Relationship to Head of Household** – When entering the first client in the household, the system will default to “Self.” It is imperative this information is entered correctly for ALL household members. Otherwise, your reports will not accurately reflect the clients and household make-up.
- **Address** – Add the address where the client currently resides (emergency shelter, etc.). If the client enters emergency shelter, you should use their previous address.

Adding Household Members

Next you will be prompted to add additional household members to include for the program enrollment or services. To add household members, click on the empty box and complete the row of information (name, birth date, etc.) for the new household member(s). You can tab through the fields to complete the required information and add any number of household members at this time by repeating these steps.

The screenshot displays the 'Family Members' section for client Wendy Thomas (000-00-0001, 1/1/1981). The interface includes a sidebar with navigation options like 'Find Client', 'Intake', 'CASE MANAGEMENT', 'Client Dashboard', 'Edit Client', 'Family Members', 'Assessments', 'Enrollments', 'Services', 'Referrals', 'Case Notes', and 'Paused Workflows'. The main content area shows the 'Family Members' tab with a table of results.

First Name	Middle Name	Last Name	Name Quality	Gender	Other Gender, please specify	Birth Date	Age	Birth Date Quality
Wendy		Thomas	Full name reported	Female		01/01/1981	34	Full DOB Reported
Dave		Thomas	Full name reported	Male		02/02/2011	4	Full DOB Reported
			--SELECT--	--SELECT--			N/A	--SELECT--

CLIENTTRACK USER MANUAL

Family Members

Search

Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. **Social Security Number and Birth Date** are the best fields to narrow your search.

First Name: Dave
Last Name: Thomas
Middle Name:
Full Name (Last, First):
Social Security Number:
Birth Date:
Client ID:

Search

No records found.

First Name Last Name Middle Name SSN Birth Date Client ID

Cancel

The system will automatically conduct a search for the new household member after you enter the first and last name. If the new household member is already in the system, click on the appropriate name in the search list that appears in the new window to attach the existing client record to the household. If the household member is a new client, click on **"Cancel"** in the search window and proceed entering the new household's information in the required data fields. Click **"Save & Close"** when finished adding household members.

Program Enrollment

Programs vary in their data requirements and ClientTrack will prompt you through the workflow to collect all of the required HUD data elements for your specific program. Please note that all fields with an **asterisk *** are required data fields and you will not be able to proceed in the workflow until all of the required information is completed.

Select your **"Program"** with the drop down box and then select which household members to enroll by clicking on the box beside the client name. If a check mark appears by a client name on the program enrollment screen (as seen below), the client will be enrolled in your program. You can de-select a client by

ClientTrack

Wendy Thomas
000-00-0001
1/1/1981

HUD Program Enrollment

Select the **Program** you are enrolling the client into. ClientTrack will display a list of clients in the client's family. Please select all the clients you are enrolling.

Program: * My Fake Organization (ESGS - R10)

Household - Excerpt from the HMIS Data Standards Manual "A household is a single individual or a group of persons who apply together to a continuous project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed)."

Name	Gender	Age	Project Entry Date	Case Manager	Relationship to Head of Household
<input checked="" type="checkbox"/> Thomas, Wendy	Female	34	09/01/2015	Autumn Gale	Self
<input checked="" type="checkbox"/> Thomas, Dave	Male	4	09/01/2015	Autumn Gale	Son

Save

CLIENTTRACK USER MANUAL

clicking on the check mark beside his/her name again to remove the check mark and ensure the client is not enrolled.

Remember to change the Enrollment Date if you are back dating the information. To ensure accurate data quality, enter all client data in a timely manner.

If you do not find your program option when enrolling a client, cancel the workflow by clicking the black "X" in the workflow screen found in the upper left-hand corner and please notify IHCD immediately at HMISHelpDesk@ihcdaonline.com. Program information must be set up in the system before you can begin to enroll clients.

HMIS Universal Data Assessment

Complete all the required data fields indicated by an **asterisk *** and click **"Save"** to continue.

The screenshot shows the ClientTrack interface for a client named Wendy Thomas. The left sidebar contains navigation links for Clients, Intake, and various case management functions. The main area displays the 'Universal Data Assessment' form. The form includes fields for Assessment Date, Age at Assessment, Assessment Type, Assessor, Program, and Housing Status. It also has sections for Client Location, Prior Residence, Time on Streets, Emergency Shelter, or Safe Haven, and Health Insurance. A table at the bottom lists insurance sources, with 'Medicaid' currently selected. A red box highlights the 'Save' button in the bottom right corner of the form.

Type	Is Primary	Status	Reason No	Start Date	End Date
Medicaid	<input checked="" type="checkbox"/>	Active		09/07/2015	
- SELECT -	<input type="checkbox"/>	- SELECT -			

Definitions of Universal Data Requirements

- **Assessment Date** – Date the assessment was completed with the client (field will auto-fill with today's date).
- **In Permanent Housing** – Select "Yes" or "No" if the client is in permanent housing. This question is only asked for CoC, ESG, and SSVF Rapid Re-Housing clients.

CLIENTTRACK USER MANUAL

Definitions of Universal Data Requirements Continued

- **Housing Status** – Choose the appropriate category for the housing status of the household. This is based on the household's housing condition just prior to project entry. More extensive definitions can be found by clicking on the blue information circle located in the upper right-hand of the screen beside the printer icon.
- **Residence Prior to Program Entry** – Identify where the client was staying on **the night before** the client is enrolled in your program.
- **Length of Stay** – Identify the length of stay for the residence prior to program entry.
- **Time on Streets, Emergency Shelter, or Safe Haven** – Data in this section are used along with disabling condition to determine whether or not a client is chronically homeless. *HUD strongly encourages HMIS users to just ask the client for the information and record the client's answer. Attempting to tie each individual response with definitions or documentation requirement is not the attempt of this question.*
- **Health Insurance Assessment** – Complete the required information pertaining to the client's insurance status. If a client's health insurance status has changed, change the status of the type of insurance to "No" and then add an end date. Then you can change the Health Insurance status to "No" and click "Save" to continue.

Veteran Assessment

The Veteran Assessment will only be included in the workflow if you select "Yes" for the "Veteran Status" on the basic information screen of the client (as seen on page 14). If the Veteran Status is "No," then the Veteran Assessment will not be collected in your program enrollment. Please be sure to review the Veteran Status with the client and select the appropriate response on the "Basic Client Information" screen of the intake workflow or "Edit Client" screen on the client record.

The screenshot displays the ClientTrack interface for a client named Wendy Thomas (DOB: 000-00-0001, 1/1/1981). The left sidebar shows the 'Intake' workflow with steps: Basic Client Information, Family Members, Program Enrollment, Assessment, and Veteran Details. The 'Veteran Assessment' form is active, showing the 'Assessment Active' status and an 'Assessment Date' of 09/19/2015. The 'Branch and Discharge Status' section includes a dropdown for 'Branch of the Military' (set to 'Army') and a dropdown for 'Discharge Status' (set to 'Honorable'). The 'Military Service Dates' section shows 'Service Entry Date' as 10/01/2011 and 'Service Exit Date' as 11/30/2014. Below this is a table for 'Please Select Theatre(s) of Operation(s)' with columns for 'Status' and 'Action'.

Please Select Theatre(s) of Operation(s)	Status	Action
Theatre of Operations: World War II	No	+
Theatre of Operations: Vietnam War	No	+
Theatre of Operations: Persian Gulf War (Operation Desert Storm)	No	+
Theatre of Operations: Afghanistan (Operation Enduring Freedom)	No	+
Theatre of Operations: Iraq (Operation Iraqi Freedom)	No	+
Theatre of Operations: Iraq (Operation New Dawn)	Yes	+
Theatre of Operations: Other Peace-keeping Operations or Military Interventions (such as Lebanon, Panama, Somalia, Bosnia, Kosovo)	No	+
Theatre of Operations: Korean War	No	+

CLIENTTRACK USER MANUAL

On the Veteran Assessment, select all **"Theatre(s) of Operation(s)"** to move forward in the workflow. To indicate which operation the client served in, change the **"Status"** of the specific operation to **"Yes"** with the drop down in that row. You can select more than one operation of service by changing the status to **"Yes"** for each one. To complete the Veteran Assessment, click **"Save."**

HMIS Barriers Assessment

To select a barrier, click on the drop down box for **"Barrier Present"** and change the status to **"Yes."** The system defaults **"No"** for all barriers. Complete any required fields that appear after selecting that specific barrier. Please note that the date identified is the program enrollment date – the date the client presents to you and qualifies for entry in the program. It is important to keep in mind that clients must have at least one barrier to be eligible for some programs (such as Permanent Supportive Housing). If **no barriers** are present at enrollment, select all barriers and leave the **"Barrier Present"** status as **"No"** and click **"Save & Close."**

The screenshot shows the 'Barriers' assessment form for Wendy Thomas (000-00-0001, 1/1/1981). The 'Assessment Active' section is titled 'Identified Date: 09/19/2015'. It contains a table with columns: Barrier, Help, Barrier Present, Receiving Services / Treatment, Condition is Indefinite, Documentation of the disability and severity on file, Explanation, and Previous Barrier Details. The table lists various barriers such as Alcohol Abuse, Developmental Disability, Drug Abuse, HIV/AIDS, Mental Health, Physical Disability, Chronic Health Condition, and AML. The 'Barrier Present' column has dropdown menus, and the 'Receiving Services / Treatment' column has a dropdown menu. The 'Explanation' column contains the text 'Bipolar disorder'. A red box highlights the 'Save' and 'Save & Close' buttons at the bottom right.

Barrier	Help	Barrier Present	Receiving Services / Treatment	Condition is Indefinite	Documentation of the disability and severity on file	Explanation	Previous Barrier Details
Alcohol Abuse		No					Previous Barrier Details
Developmental Disability		No					Previous Barrier Details
Drug Abuse		No					Previous Barrier Details
HIV/AIDS		No					Previous Barrier Details
Mental Health		Yes	Yes	Yes	Yes	Bipolar disorder	Previous Barrier Details
Physical Disability		No					Previous Barrier Details
Chronic Health Condition		No					Previous Barrier Details
AML							

Domestic Violence Assessment

Complete the required information for the Domestic Violence Assessment. Please note that if domestic violence is reported and you select **"Yes"** for **"Domestic Violence Experience,"** you will be prompted for more information. If the client reports no domestic violence, then click **"Save"** to continue through the workflow.

The screenshot shows the 'Domestic Violence Assessment' form for Wendy Thomas (000-00-0001, 1/1/1981). The 'Assessment Active' section is titled 'Assessment Date: 09/19/2015'. It contains a form with the following fields: 'Domestic Violence Experience' (radio buttons for Yes, No, Client doesn't know, Client refused, Data Not Collected), 'When Experience Occurred' (dropdown menu with 'Within the past three months' selected), and 'Currently Fleeing' (dropdown menu with 'Yes' selected). A 'Save' button is visible at the bottom.

CLIENTTRACK USER MANUAL

Financial Assessment

Complete the status for **“Income from Any Source”** and **“Non-Cash Benefits from Any Source”** with the provided drop down lists. If the status for either of these financial sources is **“Yes,”** you will be prompted to provide more information on the **“Type”** (definitions below) of income/benefit and the **amount (monthly amount)** with the list that appears below the status after selecting **“Yes.”** Please note that Non-Cash Benefits will appear below Income and you will need to scroll down to input that information.

Also input any income a child may receive (i.e., SSDI) on the head of household’s income/benefits information. You will not complete a Financial Assessment for children in the household.

The screenshot shows the ClientTrack interface for a client named Wendy Thomas. The left sidebar contains navigation links: Clients, Intake, CASE MANAGEMENT, Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Referrals, Case Notes, and Paused Workflows. The main content area is titled 'Intake' and includes a 'Veteran Assessment' tab. Below the tab, there are instructions for recording income and non-cash benefits. The 'Assessment Active' section shows the 'Assessment Date' as 09/19/2015. The 'Income from Any Source' and 'Non-Cash Benefits from Any Source' are both set to 'Yes'. Below this, the 'Income' section is expanded, showing a table with columns for 'Type', 'Description', and 'Monthly Amount'. The table lists various income sources, with 'Earned Income' selected and a value of \$800.00 entered. A 'Save and Close' button is highlighted in a red box at the bottom right of the form.

Type	Description	Monthly Amount
<input checked="" type="checkbox"/> Earned Income	Part-time employment	\$800.00
<input type="checkbox"/> Self Employment		
<input type="checkbox"/> Unemployment Insurance		
<input type="checkbox"/> Other Pension		
<input type="checkbox"/> Supplemental Security Income		
<input type="checkbox"/> Social Security Disability Income		
<input type="checkbox"/> Retirement (Social Security)		
<input type="checkbox"/> Veteran's Pension		
Count/Total Monthly Income:		1

Definitions of Sources of Income

- **Earned Income** – Employment income
- **Private Disability Insurance** – Income received from private disability insurance
- **Unemployment Insurance** – Unemployment benefits from the State
- **Worker’s Compensation** – Income for an individual who has been injured on the job
- **Pension From Former Job** – Income from a private employer or military retirement pay
- **Supplemental Security Income** – A federal program providing additional income for older and disabled individuals with little to no income stream
- **Social Security Disability Income** – A monthly compensation to individuals who can no longer work due to their medical conditions
- **Retirement (Social Security)** – Income payment provided by government for individuals who qualify
- **Alimony** – Income received for spousal/partner support

CLIENTTRACK USER MANUAL

Definitions of Sources of Income Continued

- **VA Service-Connected Disability** – A benefit paid to a veteran because of injuries or diseases that happened while on active duty or were made worse by active duty
- **VA NonService-Connected Disability** - To assist wartime veterans in need whose non-service-connected disabilities are permanent and total preventing them from following a substantially gainful occupation.
- **TANF** –Temporary Assistance for Needy Families
- **Child Support** – Income received from one parent to another to care for children
- **Other Income** – Any income not previously listed

Type	Description	Monthly Amount
<input checked="" type="checkbox"/> Earned Income	Part-time employment	\$800.00
<input type="checkbox"/> Self Employment		
<input type="checkbox"/> Unemployment Insurance		
<input type="checkbox"/> Other Pension		
<input type="checkbox"/> Supplemental Security Income		
<input type="checkbox"/> Social Security Disability Income		
<input type="checkbox"/> Retirement (Social Security)		
<input type="checkbox"/> Veteran's Pension		
<input type="checkbox"/> Veteran's Disability Payment		
<input type="checkbox"/> TANF		
<input type="checkbox"/> Child Support		
<input type="checkbox"/> Other Income		
Count/Total Monthly Income:		1 \$800.00

Type	Description	Monthly Amount
<input checked="" type="checkbox"/> Food Stamps/Money for food on benefits card	SNAP	\$200.00
<input type="checkbox"/> Special Supplemental Nutrition Program for Women, Infants, and Children		
<input type="checkbox"/> Veteran's Administration Medical Services		
<input type="checkbox"/> TANF Child Care Services		
<input type="checkbox"/> Section 8, Public Housing, or Other Rental Assistance		
<input type="checkbox"/> Other Source		
Count/Total Monthly Income:		1 \$200.00

Definitions of Non-Cash Benefits

- **Food Stamps/Money for Food on Benefits Card** – Monthly payments issued by the government to persons with low income that can be redeemed for food at stores.
- **Special Supplemental Nutrition Program for Women, Infants and Children (WIC)** – A program geared toward supplying nutritional food for at risk pregnant women and their families.
- **TANF Child Care Services** – Child care funding assistance
- **TANF Transportation Services** – Transportation funding assistance
- **Other TANF Funded Services**
- **Section 8, Public Housing or Other Rental Assistance (PSH)** – Low- and moderate-income housing subsidized by the federal Department of Housing and Urban Development.
- **Temporary Rental Assistance (RRH)** – ESG rental assistance
- **Other Source** – Any source not previously listed above.

CLIENTTRACK USER MANUAL

Adult Education

The screenshot shows the 'Adult Education Assessment' form for Wendy Thomas (DOB: 09-00-0001, 1/1/1981). The form is titled 'Assessment Active' and includes a 'Default Client's Last Assessment' button. The assessment date is 09/19/2015. The form contains several dropdown menus and checkboxes for the following fields:

- Currently in School / Working on Degree: No
- Received Vocational Training/Apprenticeship: No
- Highest Grade Completed: High school diploma
- Attendance Status: Graduated from high school
- Secondary Education: None (selected), Associates Degree, Bachelors, Masters, Doctorate, Other graduate/professional degree

Complete the required information on the Adult Education

Assessment. An education assessment will be prompted for each adult and child in the household. Click **“Save”** to continue in the workflow.

The Adult Education will conclude the workflow for your client unless there are additional household members to enroll. If you have additional

household members to enroll, you will be prompted through the required assessments for each adult and child in the household. The assessments may vary depending on the data requirements for your specific program. The assessments required for adults will look the same as those outlined for the head of household. The assessments for children will look differently and are previewed in the next section of this manual.

HMIS Universal Data Assessment for Child

Complete the required data elements for the child on the HMIS Universal Data Assessment. You will notice that the child’s assessment does not require as much information as the adult’s assessment. Click **“Save”** when finished with the assessment to continue in the workflow.

The screenshot shows the 'Universal Data Assessment' form for Dave Thomas (DOB: 000-00-0002, 2/2/2011). The form is titled 'Universal Data Assessment' and includes a 'Default Client's Last Assessment' button. The assessment date is 09/19/2015. The form contains several dropdown menus and checkboxes for the following fields:

- Age at Assessment: 4
- Assessment Type: Entry
- Assessor: Autumn Gale
- Program: My Fake Organization (ESGS - R10)
- Housing Status: Category 1 - Homeless
- Health Insurance: Yes

Below the form, there is a table for 'Note on Existing Sources' with columns for Type, Is Primary, Status, Reason No, Start Date, and End Date. The table contains one row for 'State Children's Health Insurance Program S-CHIP' with a status of 'Active' and a start date of 09/05/2015.

The 'Save' button is highlighted with a red box.

CLIENTTRACK USER MANUAL

HMIS Barriers Assessment for Child

Complete any barrier information for the child you are enrolling. If **no barriers** are present at enrollment, select all of the barriers and leave the “**Barriers Present**” status as “**No**” and click “**Save & Close**.”

The screenshot shows the 'Barriers' assessment form in ClientTrack. The left sidebar lists navigation options like 'Find Client', 'Intake', 'CASE MANAGEMENT', and 'Assessments'. The main area is titled 'Barriers' and includes a 'Universal Data Assessment' header. Below this, there's a table for assessing various barriers. The table has columns for 'Barrier', 'Help', 'Barrier Present?', 'Receiving Services / Treatment', 'Condition is Indefinite', 'Documentation of the disability and severity on file', 'Explanation', and 'Previous Barrier Details'. The 'Barrier Present?' column is set to 'No' for all listed barriers: Alcohol Abuse, Developmental Disability, Drug Abuse, HIV/AIDS, Mental Health, Physical Disability, and Chronic Health Condition. At the bottom right, a red box highlights the 'Save' and 'Save & Close' buttons.

Barrier	Help	Barrier Present?	Receiving Services / Treatment	Condition is Indefinite	Documentation of the disability and severity on file	Explanation	Previous Barrier Details
Alcohol Abuse		No					Previous Barrier
Developmental Disability		No					Previous Barrier
Drug Abuse		No					Previous Barrier
HIV/AIDS		No					Previous Barrier
Mental Health		No					Previous Barrier
Physical Disability		No					Previous Barrier
Chronic Health Condition		No					Previous Barrier

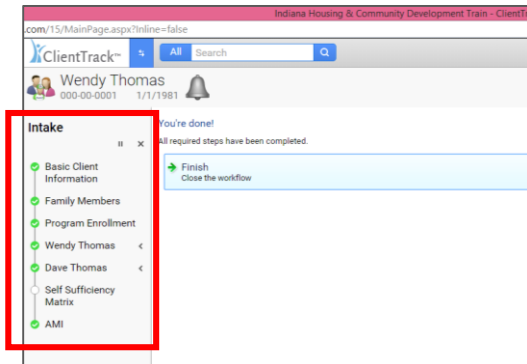
Child Education Assessment

Enter the “**Highest Grade Completed**” for the child, and then select if the child is “**Currently Enrolled in School**.” The built in logic may require additional information depending on how you answer the questions. Click “**Save**” when completed.

The screenshot shows the 'Child Education Assessment' form in ClientTrack. The left sidebar is the same as the previous form. The main area is titled 'Child Education Assessment' and includes a 'Universal Data Assessment' header. Below this, there's a form with fields for 'Assessment Date', 'Highest Grade Completed', 'Current Enrollment Status', 'Type of School', 'School Name', 'Connected with McKinney-Vento School Liaison?', and 'Comments'. The 'Assessment Date' is 09/19/2015. The 'Highest Grade Completed' is 'School program does not have grade levels'. The 'Current Enrollment Status' is 'Yes'. The 'Type of School' is 'Public School'. The 'School Name' is 'Headstart'. The 'Connected with McKinney-Vento School Liaison?' is 'No'. The 'Comments' field is empty.

CLIENTTRACK USER MANUAL

Completing the Intake Workflow



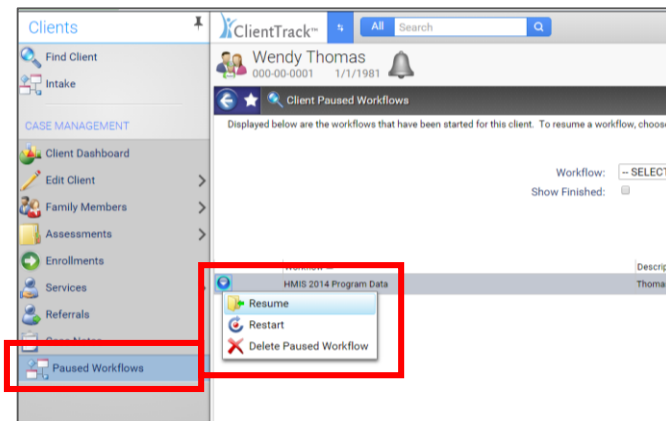
Once you have completed the required entry assessments for your client and household members, you will be prompted to **“Finish”** the workflow. If the workflow is complete then click **“Finish.”** You will then be directed back to the head of household’s client dashboard and you can see the new enrollment under **“Enrollments”** on the client record.

If you need to go back and change information entered in the workflow prior to finishing, you can click on the specific section of the workflow you wish to return to in the

workflow window that appears on the left-hand side of the client record (outlined in red). Clicking on the link beside the green dot will take you to that specific section of the workflow where you can edit information.

Pausing a Workflow

You may also **“Pause”** a workflow by clicking on the pause button located in upper right-hand corner of the workflow window beside the black **“X”** (as seen above in the red box). The black **“X”** will delete the workflow. The pause feature will allow you to pause the workflow at any time so you can return to it later.



To **resume a paused workflow**, click on **“Paused Workflows”** at the bottom of the list of case management tools located on the left-hand side of the client record. Then click on the blue play button beside your paused workflow to select **“Resume”** in the drop down. This will take you to where you paused the workflow and you can finish your program enrollment.

Unique Program Requirements at Entry

There are variations in data requirements for different program enrollments. In the following section are screenshots of program enrollments and their unique requirements during the Intake workflow for the following programs:

1. SSVF
2. PATH
3. HOPWA
4. RHV

CLIENTTRACK USER MANUAL

1. SUPPORTIVE SERVICES FOR VETERAN FAMILIES (SSVF) ENROLLMENT

In addition to the previous assessments outlined earlier in this manual, the SSVF enrollment will require documentation of a client's **“Residential Move-In Date Information”** and **Permanent Housing status** for Rapid Re-Housing enrollments as seen below. All fields with an **asterisk *** are required fields.

The screenshot shows the 'HUD Program Enrollment' form in ClientTrack. The left sidebar lists navigation options like 'Find Client', 'Intake', 'CASE MANAGEMENT', and 'Enrollments'. The main form area is titled 'HUD Program Enrollment' and includes a search bar, a program selection dropdown (SSVF VOA (Evanville) RRH), and a table of clients. The table has columns for Name, Gender, Age, Project Entry Date, Case Manager, Relationship to Head of Household, Residential Move-In Information Date, In Permanent Housing, and Date Of Move In. A client named 'Test Test' is listed with a move-in date of 09/26/2015. Below the table, there are checkboxes for 'Restrict to Organization' and 'Restrict to MOU/Info Release'.

The SSVF project enrollment will also require completion of the **Annual Median Income (AMI)**, **HP Screening Score** and **VAMC Station Number** for the client. The **“Address Prior to Entry”** will also be required to proceed in the workflow as seen below.

The screenshot shows the 'Universal Data Assessment' form in ClientTrack for client 'Wendy Thomas'. The form includes fields for 'Assessment Date', 'Age at Assessment', 'Assessment Type', 'Assessor', 'Program', 'Housing Status', 'Household Income as a Percentage of AMI', 'HP Screening Score', and 'VAMC Station Number'. A red box highlights the 'Program', 'Housing Status', 'Household Income as a Percentage of AMI', 'HP Screening Score', and 'VAMC Station Number' fields. Below these fields, there are sections for 'Client Location', 'Prior Residence', and 'Address Prior to Entry'. The 'Address Prior to Entry' section includes fields for 'Address Prior To Entry Quality', 'Address', 'City, State, Zip Code', and a help icon. A red box highlights the 'Address Prior To Entry Quality', 'Address', and 'City, State, Zip Code' fields.

CLIENTTRACK USER MANUAL

2. PROGRAMS FOR ASSISTANCE IN TRANSITION FROM HOMELESSNESS (PATH) ENROLLMENT

To manage your PATH program and clients in ClientTrack, be sure to log into the **“2014 IHCD HMIS: Street Outreach”** workgroup. In addition to the entry assessments outlined earlier in this manual, the PATH project enrollment will require you to document:

- **Date of Engagement** - Date of Engagement is defined as the date on which an interactive client relationship results in a deliberate client assessment or beginning of a case plan.
- **Date PATH Status Determined** - Date client's enrollment in PATH is determined.
- **Client Became Enrolled in PATH** - A PATH enrollment occurs at the point when a client has formally consented to participate in services provided by the PATH project. This does not mean the time at which the client formally consents to services by a community mental health center.

Before completing the Intake workflow, you will also be required to document your PATH contact information as seen below.

The screenshot shows the ClientTrack interface for a client named Wendy Thomas. The 'Intake' workflow is active, and the 'HUD Program Enrollment' step is selected. A table lists the client's enrollment details.

Name	Gender	Age	Project Entry Date	Case Manager	Relationship to Head of Household	Date of Engagement	Date PATH Status Determined	Client became enrolled in PATH	Reason not enrolled in PATH
Thomas, Wendy	Female	34	09/07/2015	Autumn Gale	Self	09/04/2015	09/07/2015	Yes	
Thomas, Dave	Male	4	09/07/2015	Autumn Gale	Son				

Date of Contact, Contact Service and Contact Location will also be required as seen below. Complete all of the required data fields to complete the PATH enrollment.

The screenshot shows the ClientTrack interface for a client named Wendy Thomas. The 'Contact' workflow is active, and the 'Domestic Violence Assessment' step is selected. The form displays contact details for Wendy Thomas.

Domestic Violence Assessment

The HMIS Data Standards manual defines a contact "as an interaction between a worker and a client. Contacts may range from simple a verbal conversation between the street outreach worker and the client about the client's well-being or needs or may be a referral to service."

Assessment Active

Date of Contact: 09/07/2158
Contact with: Autumn Gale
Enrollment: 09/07/2158 - My Fake Organization Street Outreach (PATH-R10)
Contact Service: PATH - Outreach
Contact Location: Place not meant for habitation
Exact geographic location: Location permission denied.
Alter Units: ☐
Comments:

CLIENTTRACK USER MANUAL

3. HOUSING OPPORTUNITIES FOR PERSONS WITH AIDS (HOPWA) ENROLLMENT

In addition to the entry assessments outlined earlier in this manual, for a HOPWA program enrollment a **“Medical Assistance Assessment”** and **“T-Cell Count/Viral Load Assessment”** are required to be completed for the client as seen below.

The screenshot shows the ClientTrack interface for a client named Wendy Thomas (000-00-0001, 1/1/1981). The left sidebar lists navigation options under 'CASE MANAGEMENT', including Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Referrals, Case Notes, and Paused Workflows. The main content area is titled 'Medical Assistance Assessment' and includes a description: 'The medical assistance assessment is primarily used to determine whether HIV positive clients are accessing medical assistance benefits for which they may be eligible. Medical assistance data is required for clients with HIV/AIDS who are enrolled in a HOPWA-funded program.' Below this, there is an 'Assessment Active' section with an 'Assessment Date' of 09/21/2015. A table lists medical assistance types with status and reason fields.

Medical Assistance Type	Status	Reason No (if applicable)
Receiving Public HIV/AIDS Medical Assistance	Yes	
Receiving AIDS Drug Assistance Program (ADAP)	No	Applied; decision pending

Use the drop down box to change the status of each field to **“Yes”** if the data is reported. After **“Yes”** is selected for **“T-cell (CD4) Count Available”** or **“Viral Load Available,”** additional fields will populate in the blue table below where the specific counts can be entered.

The screenshot shows the ClientTrack interface for the same client, Wendy Thomas, now on the 'T-cell/Viral Measurements' form. The description states: 'This data, as is all HIV/AIDS data, is confidential, covered under special law, and may not be shared without the expressed consent of the client. Providing the information is completely voluntary on the client's part and failure to report (i.e. client doesn't know or client refused) will not be considered in data quality for either the CoC or the HOPWA program.' The 'Assessment Active' section shows 'Assessment Date' as 09/21/2015, with 'T-cell (CD4) Count Available' and 'Viral Load Available' both set to 'Yes'. Below this, a table allows for data entry with columns for Date, Measurement/Value, and How was the data obtained.

Date	Measurement/Value	How was the data obtained
09/25/2015	Viral Load 383928 / 999999	Client Report
09/25/2015	T-cell Count 789 / 1500	Client Report

CLIENTTRACK USER MANUAL

4. RUNAWAY & HOMELESS YOUTH (RHY) ENROLLMENT

HUD requires additional data collection for the Runaway & Homeless Youth (RHY) program in HMIS. When you begin the Intake Workflow for a new client, you will be prompted to complete **“Sexual Orientation”** on the client’s basic information screen as seen below.

The screenshot shows the 'Basic Client Demographics' form in ClientTrack. The left sidebar contains navigation links: Enrollments, Services, Referrals, Case Notes, and Paused Workflows. The main form area includes fields for Birth Date (02/02/2000), Client Age (15), Date of Birth Quality (Full DOB Reported), Ethnicity (Non-Hispanic/Latino), Race (White), Gender (Male), Sexual Orientation (Heterosexual), and Family Information. A dropdown menu for Sexual Orientation is open, showing options: Heterosexual, Gay, Lesbian, Bisexual, Questioning / Unsure, Don't Know, Refused, and Data not collected. The form also includes a 'Show Address and Contact Information' button and a 'Family Information' section with fields for Family, Relationship to Head of Household, and Begin Date (09/23/2015). At the bottom right, there are 'Previous' and 'Finish' buttons.

You will also complete the following assessments:

Basic Care Program (BCP) Enrollment Status Assessment – Complete the required data and click **“Save”** to continue.

The screenshot shows the 'RHY BCP Status Assessment' form in ClientTrack. The left sidebar contains navigation links: Clients, Find Client, RHY Program Data Intake, CASE MANAGEMENT, Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Referrals, and Case Notes. The main form area includes a header for 'Neverland, Jake' and a search bar. The form title is 'RHY BCP Status Assessment'. Below the title, there is a description: 'To determine the number of homeless persons eligible for FYSB in RHY BCP-funded emergency shelter projects.' The form includes a 'Date Status Determined' field (09/23/2015) and an 'Enroll Status' dropdown menu (Yes). At the bottom, there is a 'Save' button.

Employment Assessment – The built in logic will require additional information depending on the client’s employment status. Click **“Save”** to continue.

The screenshot shows the 'Employment Assessment' form in ClientTrack. The left sidebar contains navigation links: Clients, Find Client, RHY Program Data Intake, CASE MANAGEMENT, Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Referrals, and Case Notes. The main form area includes a header for 'Neverland, Jake' and a search bar. The form title is 'Employment Assessment'. Below the title, there is a description: 'Check the appropriate employment status at the time of assessment. If the client is employed, record the hours worked in the week prior to assessment, and select the tenure of the employment position. If the client is not employed, indicate if the client is looking for work.' The form includes a 'Date Status Determined' field (09/23/2015), an 'Employed?' dropdown menu (Yes), a 'Type of Employment' dropdown menu (Seasonal / sporadic (including day labor)), a 'Hours Worked in Last Week' field (10.00), and an 'Employment Tenure' dropdown menu (Temporary). At the bottom, there is a 'Save' button.

CLIENTTRACK USER MANUAL

Health Assessment - Complete the required data and click “**Save**” to continue.

The screenshot shows the ClientTrack interface for a client named Jake Neverland. The left sidebar lists various case management options. The main content area is titled 'Health Assessment' and includes a 'Default Client's Last Assessment' button. Below this, the 'Assessment Active' section contains several dropdown menus for 'Assessment Date', 'General Health Status', 'Dental Health Status', and 'Mental Health Status'. The 'Assessment Date' is set to 09/14/2015. The 'General Health Status' is set to 'Good', 'Dental Health Status' is set to 'Fair', and 'Mental Health Status' is set to 'Good'.

Commercial Sexual Exploitation and Commercial Labor Exploitation Assessments – These assessments are new requirements for the RHY program. Complete all the fields with a red asterisk (*) to continue in the workflow.

The screenshot shows the ClientTrack interface for a client named Jake Neverland, specifically the 'RHY Entry Assessment' form. The left sidebar lists various case management options. The main content area is titled 'RHY Entry Assessment' and includes a 'Default Client's Last Assessment' button. Below this, the 'Assessment Active' section contains several dropdown menus for 'Assessment Date' and 'Referral Source'. The 'Assessment Date' is set to 09/14/2015 and the 'Referral Source' is set to 'Self-Referral'. The form includes sections for 'Commercial Sexual Exploitation' and 'Commercial Labor Exploitation', each with several yes/no questions. The 'Commercial Sexual Exploitation' section includes questions about receiving anything in exchange for sex, and the 'Commercial Labor Exploitation' section includes questions about being afraid to quit/leave work, being promised work where work or payment is different than expected, and feeling forced, pressured or tricked into continuing the job. At the bottom, there is a table for 'Critical Issue' with columns for 'Status' and 'Incarcerated Parent Type'. The table includes rows for 'Household Dynamics', 'Sexual Orientation/Gender Identity - Youth', 'Sexual Orientation/Gender Identity - Family member', 'Housing Issues - Youth', 'Housing Issues - Family member', and 'School or Educational Issues - Youth'. The 'Status' column has dropdown menus for each row, and the 'Incarcerated Parent Type' column has a dropdown menu. The 'Status' dropdowns are set to 'Yes', 'No', 'No', 'Yes', 'No', and 'No' respectively. The 'Incarcerated Parent Type' dropdown is set to 'No'.

CLIENTTRACK USER MANUAL

Critical Issue(s) Assessment – The built in logic may require additional data depending on the client’s responses to the questions. To move forward on this assessment, click all of the **“Critical Issues”** and change the default **“Status”** to **“Yes”** for those the client reports as critical issues. Click **“Save”** to continue the workflow.

ClientTrack - Neverland, Jake 2/2/2000 247

Intake

Basic Client Information

Family Members

Program Enrollment

Neverland, Jake

Assessment

BCP Status

Barriers / Special Needs

Employment

Child Education

Health

RHY Entry Assessment

Formerly Ward Of

Child Education Assessment

Health Assessment

RHY Entry Assessment

Ever promised work where work or payment different than you expected: Yes

Felt forced, pressured or tricked into continuing the job: Yes

In the last 3 months: Yes

Critical Issue	Status	Incarcerated Parent Type
Household Dynamics	Yes	
Sexual Orientation/Gender Identity - Youth	No	
Sexual Orientation/Gender Identity - Family member	No	
Housing Issues - Youth	No	
Housing Issues - Family member	Yes	
School or Educational Issues - Youth	No	
School or Educational Issues - Family member	No	
Unemployment - Youth	No	
Unemployment - Family member	Yes	
Mental Health Issues - Youth	No	
Mental Health Issues - Family member	Yes	
Health Issues - Youth	No	
Health Issues - Family member	No	
Physical Disability - Youth	No	
Physical Disability - Family member	No	
Mental Disability - Youth	No	
Mental Disability - Family member	No	
Abuse and Neglect - Youth	No	
Abuse and Neglect - Family member	No	
Alcohol or other drug abuse - Youth	No	
Alcohol or other drug abuse - Family member	No	
Insufficient income to support youth - Family member	No	
Active Military Parent - Family member	No	
Incarcerated Parent of Youth	No	

Save No Changes

Formerly Ward Of Assessment – Complete all of the required data to move forward in the workflow. Be sure to check both **“Systems”** and change the default status of **“Formerly Ward Of”** to **“Yes”** if the client reports being a ward of that system. Click **“Save”** to continue.

ClientTrack - Neverland, Jake 2/2/2000 247

Intake

Basic Client Information

Family Members

Program Enrollment

Neverland, Jake

Assessment

BCP Status

Barriers / Special Needs

Employment

Child Education

Health

RHY Entry Assessment

Formerly Ward Of

Health Assessment

RHY Entry Assessment

System Use

Assessment Active

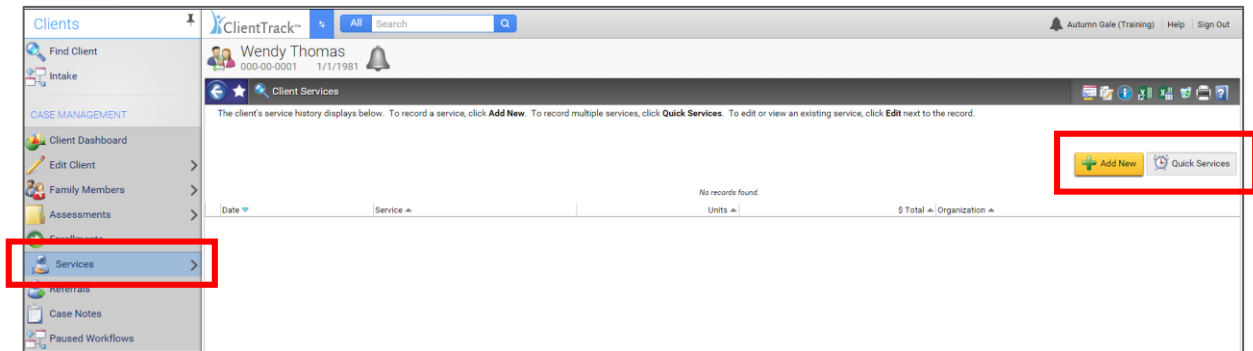
Assessment Date: 09/14/2015

System	Formerly a Ward Of	Number of Years	Number of Months (1-11)
Child Welfare/Foster Care Agency	Yes	3 to 5 or more years	6
Juvenile Justice System	No		6

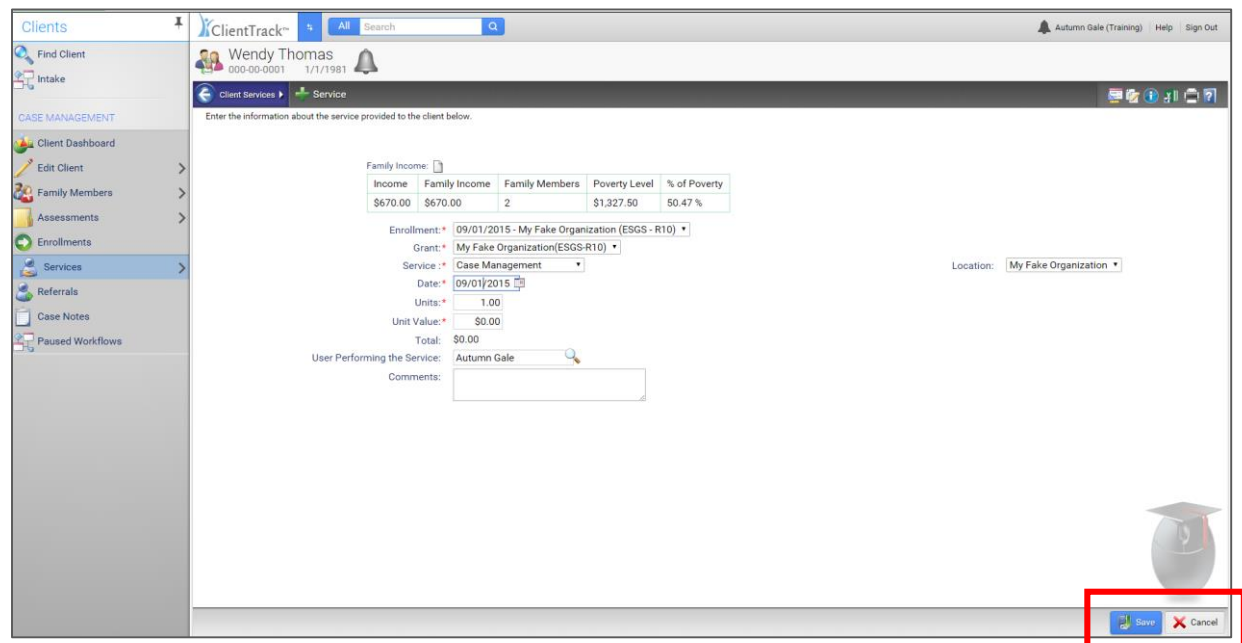
CLIENTTRACK USER MANUAL

ADDING SERVICES

After completing an enrollment for a client, you can document services associated with the program enrollment with the **“Services”** link located in the list of case management tools on the left-hand side of the client record. This will open the Services window where you can **“Add New”** services or manage current services.



To document a new services, click on **“Add New.”** You will see the Services home screen where you select the enrollment associated with the service and the service provided. You can also enter units (1.00 unit = one hour of case management or a bus pass) to track costs. The comments section can be used for reminders; however, this is not the area to write case notes. Case Notes will be covered later in the manual. Please note that services can be tailored to your organization’s needs. If a service does not appear in your agency’s options, contact the help desk to request that it be added.



CLIENTTRACK USER MANUAL

When you are finished documenting a service, click on the **“Save”** button and you will be taken back to the Services home screen where you can edit or delete a service you created.

Quick Services

When you need to add more than one service and the services were provided on the same date, you can use the **“Quick Services”** option to document all of the services at the same time. The **“Quick Services”** button is located beside the **“Add New”** button on the Services home screen. With this feature you can add multiple services to a client record at one time by selecting the **“Enrollment”** and checking the services with the **“Check Box”** next to the service you provided. If you need services added to the list of options, contact the HMIS Help Desk and a technician can customize that information for your agency.

Service	Units	Unit Value	Total	End Date	Comments	Help
<input type="checkbox"/> 2015 Point in Time Count	1.00	\$0.00	\$0.00			
<input type="checkbox"/> Case Management	1.00	\$0.00	\$0.00			
<input type="checkbox"/> Case Management	1.00	\$0.00	\$0.00			
<input type="checkbox"/> Case Management	1.00	\$0.00	\$0.00			
<input checked="" type="checkbox"/> Bus Pass	1.00	\$1.00	\$1.00			
<input checked="" type="checkbox"/> Case Management	1.00	\$0.00	\$0.00			
	2.00	\$1.00	\$1.00			

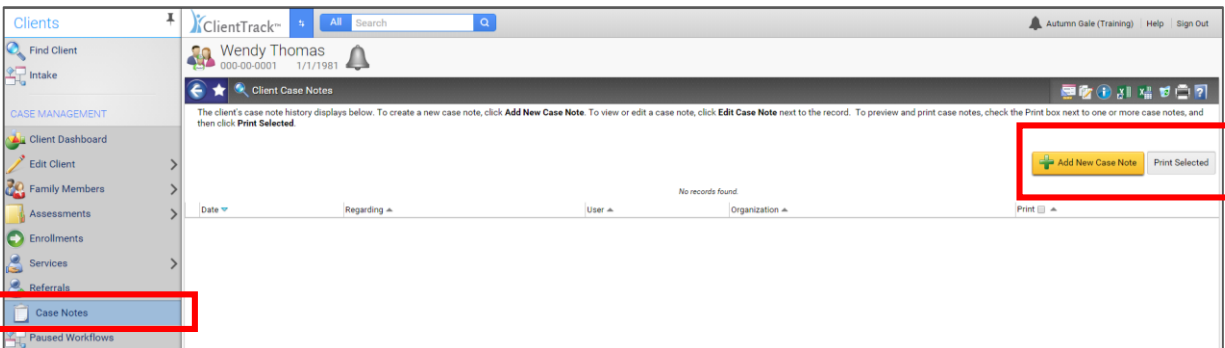
Once you are finished adding multiple services click on the **“Save & Close”** button and you will return to the Services home screen where you can view and manage services.

CASE NOTES

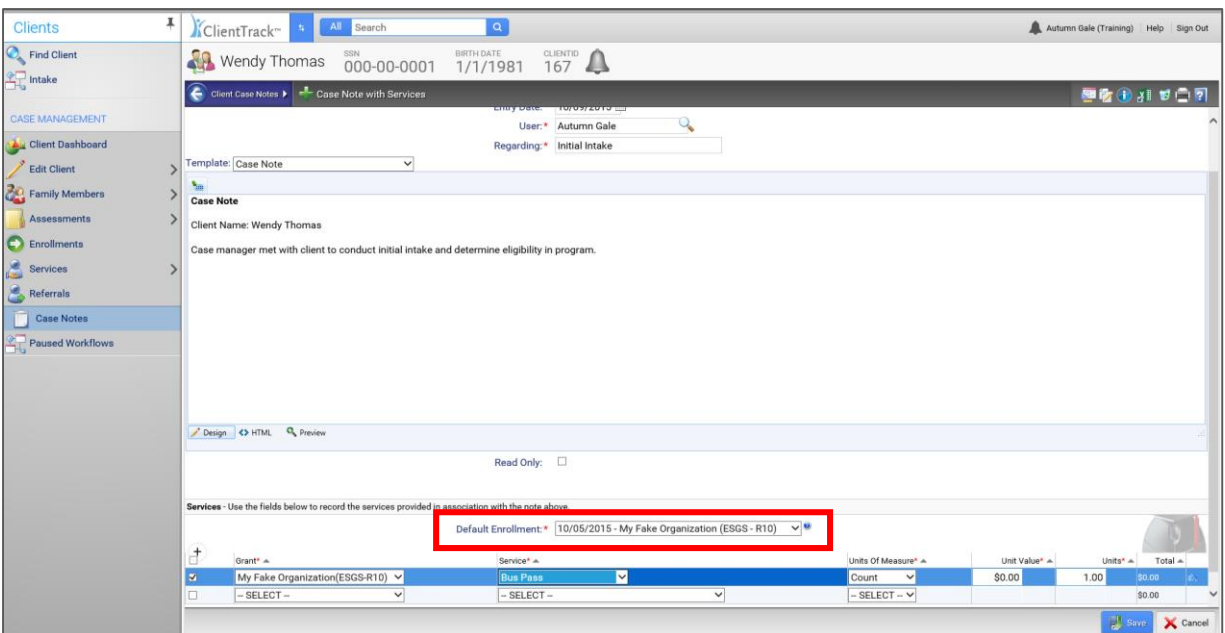
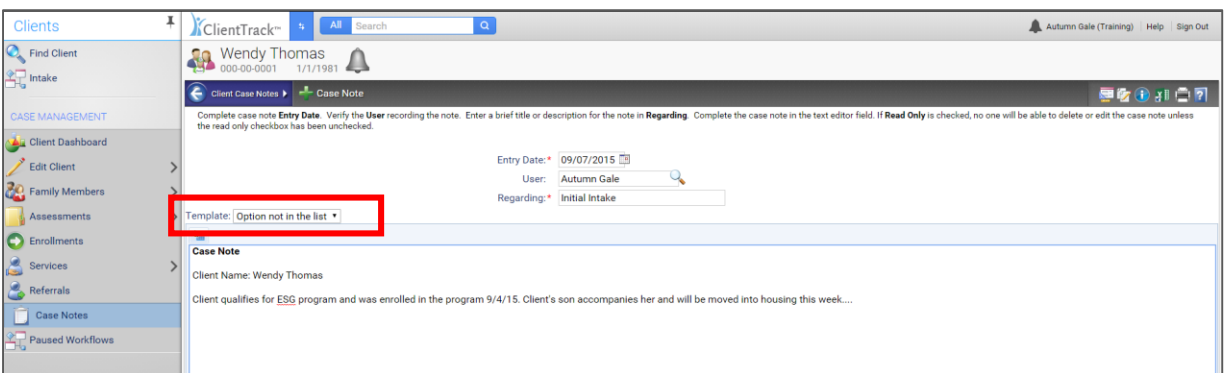
Timely and robust case notes assist you and other case managers at your organization in serving your clients. It is extremely important that meetings, calls and other relevant information regarding your client are properly documented in case notes.

To add case notes, click on the **“Case Notes”** link in the list of case management tools on the left-hand side of the screen. Click on the **“Add New”** button on the upper right-hand side of the screen. ***Any case notes created for a client are restricted to case managers within your organization. No one outside of your agency can view your case notes.***

CLIENTTRACK USER MANUAL



An example of a case note is below as well as an example of a case note with the option to document a service simultaneously. Templates can also be set up for housing plans or any other specific required documentation so it can easily be drafted as a case note. Notify the help desk with any template requests.

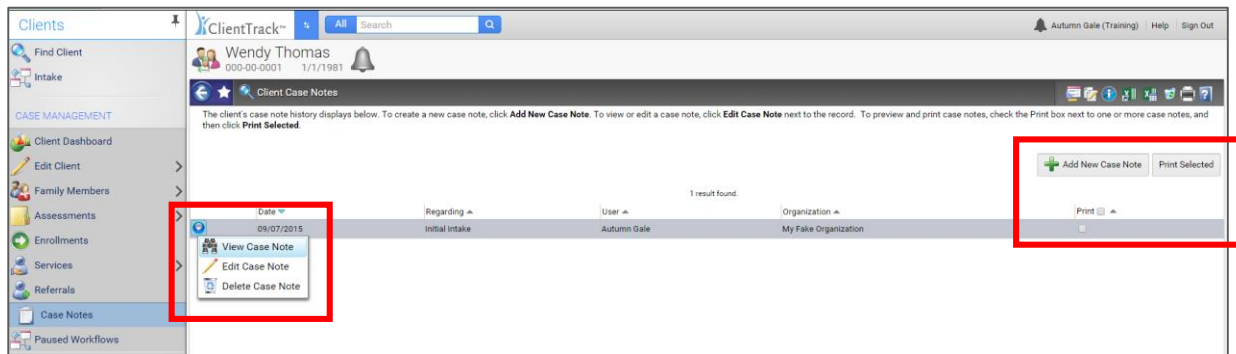


CLIENTTRACK USER MANUAL

Once a case note is created, it will appear in a list of case notes on the Case Notes home screen. You can use the blue play button beside the case note to:

- View Case Note
- Edit Case Note

You can also select case notes to print by clicking on the **“Print”** box located in the far column and clicking on the **“Print Selected”** button beside the **“Add New”** button. This will print all of the “checked” case notes.

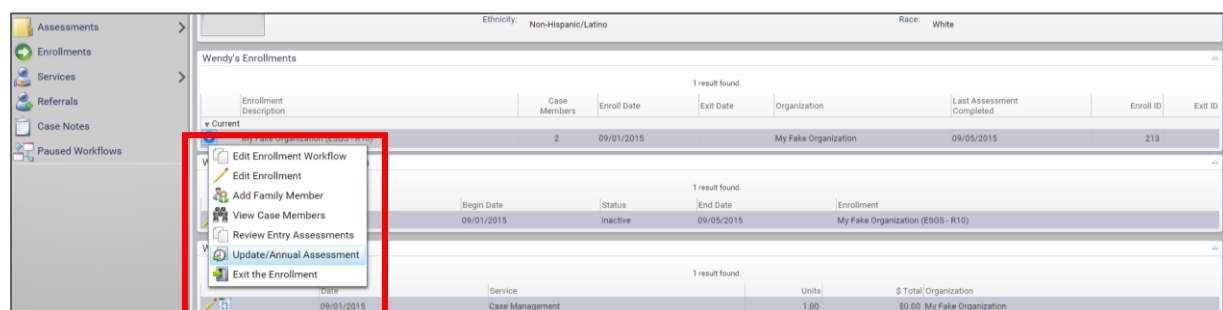


UPDATE/ANNUAL ASSESSMENT

For clients who spend longer periods of time in your program or to document any changes in your client's status since entry, you can conduct an **“Update/Annual Assessment”** formerly known as the During Program Enrollment Assessment. This assessment is required if clients are enrolled in your program for a year or longer, and some programs like SSVF require more frequent assessments so be sure to check your program requirements for the Update/Annual Assessment.

The Update/Annual Assessment is also helpful for tracking significant changes to a household – for example a client gets a job and the income changes, a client receives his/her GED, or a baby is born and needs to be added to the household and enrollment. For your convenience, the assessment has been developed as a workflow with the following steps:

- Click on the blue play button beside your program enrollment;
- Select “Update/Annual Assessment” from the drop down list; and
- Complete the required assessments prompted by the workflow and save as you go.



CLIENTTRACK USER MANUAL

The first screen you will be taken to will review the household members and the enrollment. Click **“Save”** or **“No Changes”** in the bottom right-hand corner to continue in the workflow.

This screenshot shows the 'HUD Program Enrollment' screen in ClientTrack. The left sidebar contains navigation options like 'Find Client', 'Intake', 'CASE MANAGEMENT', and 'Enrollments'. The main area displays client information for Wendy Thomas (000-00-0001, 1/1/1981) and a list of household members for enrollment. A table lists household members with columns for Name, Gender, Age, Project Entry Date, Case Manager, and Relationship to Head of Household.

Name	Gender	Age	Project Entry Date	Case Manager	Relationship to Head of Household
Thomas, Wendy	Female	34	09/01/2015	Autumn Gale	Self
Thomas, Dave	Male	4	09/01/2015	Autumn Gale	Son

HMIS Universal Data Assessment

You will then review the head of household’s universal data where you can document any changes. Please note that you can change the assessment date at the top of the screen to reflect the actual date of the assessment if entered at another time.

This screenshot shows the 'Universal Data Assessment' screen in ClientTrack. The left sidebar is the same as the previous screen. The main area contains fields for assessment details: Assessment Date (09/07/2015), Age at Assessment (34), Assessment Type (During Program Enrollment), Assessor (Autumn Gale), and Program (My Fake Organization (ESGS - R10)). Below these are sections for Client Location (Indiana, Indiana Balance of State) and Health Insurance (Yes). A table at the bottom lists existing insurance sources, with the first entry being Medicaid, which is active and has a start date of 09/07/2015.

Type	Is Primary	Status	Reason No	Start Date	End Date
Medicaid	Yes	Active		09/07/2015	
--SELECT--	Yes	--SELECT--			

CLIENTTRACK USER MANUAL

HMIS Barriers Assessment

Review the HMIS Barriers and make any changes necessary. It will populate all of the information previously entered for you. If no barriers are present, click **“Save & Close”** to move forward in the workflow.

The screenshot shows the ClientTrack interface for the 'Annual Assessment' of Wendy Thomas. The 'Barriers' tab is selected. The form includes a table for identifying barriers with columns for Barrier, Barrier Present?, Receiving Services / Treatment, Condition is Indefinite, Documentation of the disability and severity on file, Explanation, and Previous Barrier Details. The table lists barriers such as Alcohol Abuse, Developmental Disability, Drug Abuse, HIV/AIDS, Mental Health, Physical Disability, and Chronic Health Condition. The 'Mental Health' row is highlighted, showing 'Yes' for 'Barrier Present?' and 'Receiving Services / Treatment', and 'Bi-polar disorder' in the 'Explanation' column.

Barrier	Barrier Present?	Receiving Services / Treatment	Condition is Indefinite	Documentation of the disability and severity on file	Explanation	Previous Barrier Details
Alcohol Abuse	No					Previous Barrier
Developmental Disability	No					Previous Barrier
Drug Abuse	No					Previous Barrier
HIV/AIDS	No					Previous Barrier
Mental Health	Yes	Yes	Yes	Yes	Bi-polar disorder	Previous Barrier
Physical Disability	No					Previous Barrier
Chronic Health Condition	No					Previous Barrier

DV Assessment

Complete the required information for the Domestic Violence Assessment. You can use the **“Default Last Assessment”** button to populate the information that was entered at entry. This is a helpful feature to quickly enter data if the information has not changed. Click **“Save”** to continue through the workflow

The screenshot shows the ClientTrack interface for the 'Domestic Violence Assessment' of Wendy Thomas. The form includes fields for Assessment Date, Domestic Violence Experience (Yes/No/Client doesn't know/Client refused/Data Not Collected), When Experience Occurred (Within the past three months), and Currently Fleeing (No). A red box highlights the 'Default Client's Last Assessment' button.

Assessment Date: 09/07/2015
Domestic Violence Experience: ☒ Yes
☐ No
☐ Client doesn't know
☐ Client refused
☐ Data Not Collected
When Experience Occurred: Within the past three months
Currently Fleeing: No

CLIENTTRACK USER MANUAL

Financial Assessment

Review the Financial information for the head of household and document any changes to the household income. You can use the **“Default Last Assessment”** button to populate the information that was entered at entry. Be sure to scroll down to complete Non-Cash Benefits and click **“Save and Close”** when finished.

The screenshot shows the ClientTrack Annual Assessment form for Wendy Thomas (000-00-0001, 1/1/1981). The form is titled "Annual Assessment" and includes a sidebar with navigation options like "Find Client", "Intake", "CASE MANAGEMENT", "Client Dashboard", "Edit Client", "Family Members", "Assessments", "Enrollments", "Services", "Referrals", "Case Notes", and "Paused Workflows". The main content area shows the "Income and Sources, Non-Cash Benefits" section. A red box highlights the "Default Last Assessment" button. Below this, the "Income" section is highlighted with a red box. The "Income" section includes a table with columns for "Type", "Description", and "Monthly Amount". The table lists various income sources, with "Earned income" selected and showing a monthly amount of \$670.00. The "Count/Total Monthly Income" is 1, totaling \$670.00. A "Save and Close" button is visible at the bottom right.

Type	Description	Monthly Amount
<input checked="" type="checkbox"/> Earned income	Part-time employment at	\$670.00
<input type="checkbox"/> Self Employment		
<input type="checkbox"/> Unemployment Insurance		
<input type="checkbox"/> Other Pension		
<input type="checkbox"/> Supplemental Security Income		
<input type="checkbox"/> Social Security Disability Income		
<input type="checkbox"/> Retirement (Social Security)		
<input type="checkbox"/> Veteran's Pension		
<input type="checkbox"/> Veteran's Disability Payment		
<input type="checkbox"/> TANF		
Count/Total Monthly Income:		1 \$670.00

The screenshot shows the ClientTrack Annual Assessment form for Wendy Thomas (000-00-0001, 1/1/1981). The form is titled "Annual Assessment" and includes a sidebar with navigation options like "Find Client", "Intake", "CASE MANAGEMENT", "Client Dashboard", "Edit Client", "Family Members", "Assessments", "Enrollments", "Services", "Referrals", "Case Notes", and "Paused Workflows". The main content area shows the "Income and Sources, Non-Cash Benefits" section. The "Income" section is visible, showing a total monthly income of \$670.00. Below this, the "Non-Cash Benefits" section is highlighted with a red box. The "Non-Cash Benefits" section includes a table with columns for "Type", "Description", and "Monthly Amount". The table lists various non-cash benefits, with "Food stamps/Money for food on benefits card" selected and showing a monthly amount of \$200.00. The "Count/Total Monthly Income" is 1, totaling \$200.00. A "Save and Close" button is visible at the bottom right.

Type	Description	Monthly Amount
<input checked="" type="checkbox"/> Food stamps/Money for food on benefits card	SNAP	\$200.00
<input type="checkbox"/> Special Supplemental Nutrition Program for Women, Infants, and Children		
<input type="checkbox"/> Veteran's Administration Medical Services		
<input type="checkbox"/> TANF Child Care Services		
<input type="checkbox"/> Section 8, Public Housing, or Other Rental Assistance		
<input type="checkbox"/> Other Source		
Count/Total Monthly Income:		1 \$200.00

CLIENTTRACK USER MANUAL

Adult Education Assessment

Complete the Adult Education Assessment. Remember that all fields with an **asterisk *** are required. The **“Default Client’s Last Assessment”** will populate information from the previous assessment completed and is helpful if the client’s information has not changed. Click **“Save”** when finished.

The screenshot shows the ClientTrack interface for Wendy Thomas (000-00-0001). The 'Annual Assessment' section is active. A red box highlights the 'Default Client's Last Assessment' button. The form includes fields for 'Assessment Date' (09/07/2015), 'Currently in School / Working on Degree' (No), 'Received Vocational Training/Apprenticeship' (No), 'Highest Grade Completed' (High school diploma), 'Attendance Status' (Graduated from high school), and 'Secondary Education' (None). A dropdown menu for 'Secondary Education' is open, showing options: None, Associates Degree, Bachelors, Masters, Doctorate, and Other graduate/professional degree.

HMIS Universal Data Assessment for Child

After completing all of the updated assessments for the head of household, you will be prompted through the assessments for all enrolled household members. The adult assessments will look like the head of household’s assessments. The Update/Annual Assessment will look differently for children.

The screenshot shows the ClientTrack interface for Dave Thomas (000-00-0002). The 'Universal Data Assessment' section is active. A red box highlights the 'Default Client's Last Assessment' button. The form includes fields for 'Assessment Date' (09/07/2015), 'Age at Assessment' (4), 'Assessment Type' (During Program Enrollment), 'Assessor' (Autumn Gale), and 'Program' (My Fake Organization (ESGS - R10)). A 'Health Insurance' section is also present with a 'Yes' selection. A table titled 'Note on Existing Sources' is shown with columns: Type, Is Primary, Status, Reason No, Start Date, and End Date. The table contains one row for 'State Children's Health Insurance Program S-CHIP' with status 'Active' and start date '09/07/2015'. A 'Save' button is at the bottom right.

CLIENTTRACK USER MANUAL

HMIS Barriers Assessment for Child

Complete the Barriers Assessment for the child. If no barriers are reported, click **“Save & Close”** to continue in the workflow.

The screenshot shows the ClientTrack interface for Dave Thomas (000-00-0002, 2/2/2011). The left sidebar lists navigation options under 'CASE MANAGEMENT'. The main area is titled 'Annual Assessment' and 'Barriers'. It includes a search bar, a 'View Barrier History' button, and a table for assessing various barriers. The table has columns for Barrier, Help, Barrier Present, Receiving Services / Treatment, Condition is Indefinite, Documentation of the disability and severity on file, Explanation, and Previous Barrier Details.

Barrier	Help	Barrier Present	Receiving Services / Treatment	Condition is Indefinite	Documentation of the disability and severity on file	Explanation	Previous Barrier Details
Alcohol Abuse	?	No					Previous Barrier
Developmental Disability	?	No					Previous Barrier
Drug Abuse	?	No					Previous Barrier
HIV/AIDS	?	No					Previous Barrier
Mental Health	?	No					Previous Barrier
Physical Disability	?	No					Previous Barrier
Chronic Health Condition	?	No					Previous Barrier

Child Education Assessment

The screenshot shows the ClientTrack interface for Dave Thomas (000-00-0002, 2/2/2011). The left sidebar lists navigation options under 'CASE MANAGEMENT'. The main area is titled 'Annual Assessment' and 'Child Education Assessment'. It includes a 'Default Last Assessment' button, a date field for 'Assessment Date', a dropdown for 'Highest Grade Completed', a radio button group for 'Current Enrollment Status', a dropdown for 'Type of School', a text field for 'School Name', a dropdown for 'Headstart', a dropdown for 'Connected with McKinney-Vento School Liaison?', and a text field for 'Comments'.

Enter the **“Highest Grade Completed”** for the child, and then select if the child is **“Currently Enrolled in School.”** The built in logic may require additional information depending on how you answer the questions. Click **“Save”** when completed.

Once you have completed the required entry assessments for your client and household members, you will be prompted to **“Finish”** the workflow. If the workflow is complete then click **“Finish.”** You will then be directed back to the head of household’s client record.

The screenshot shows the ClientTrack interface for Wendy Thomas (000-00-0001, 1/1/1981). The left sidebar lists navigation options under 'CASE MANAGEMENT'. The main area is titled 'Annual Assessment' and shows a 'Finish' button with the text 'You're done! All required steps have been completed. Finish Close the workflow'.

CLIENTTRACK USER MANUAL

PROGRAM DISCHARGE

When a client has transitioned from your project or is no longer receiving services for any reason, you will discharge the client from your program in ClientTrack with the following steps:

- Go to the client record;
- Click on the blue play button beside your project enrollment located in the center of the client record;
- Select **“Exit the Enrollment”** in the drop down list that appears after clicking on the blue play button; and
- Complete the information prompted for through the Exit workflow and save as you go.

The screenshot shows the ClientTrack interface for a client named Wendy Thomas (ID: 000-00-0001, DOB: 1/1/1981). The client's profile includes demographic information: Gender: Female, Disabling Condition: Yes, Veteran: No, Ethnicity: Non-Hispanic/Latino, Race: White. The 'Enrollments' section shows a table with one enrollment: 'My Fake Organization (ESGS - R10)' with 2 case members, enrolling on 09/01/2015, with an exit date of 09/01/2015, and an enrollment ID of 213. A dropdown menu is open, showing options: 'Edit Enrollment Workflow', 'Edit Enrollment', 'Add Family Member', 'View Case Members', 'Review Entry Assessments', 'Update/Annual Assessment', and 'Exit the Enrollment'. The 'Exit the Enrollment' option is highlighted with a red box.

On the first screen of the exit workflow, you will be asked for the **“Exit Date,” “Destination,” “Exit Reason,”** and whether to **“End Case Assignment.”** Please note that all fields with an **asterisk *** are required.

The screenshot shows the 'Exit Enrollment' workflow for Wendy Thomas. The 'Exit Date' is 09/05/2015. The 'Destination' is 'Transitional Housing for homeless persons (including homeless youth)'. The 'Exit Reason' is 'Left for a housing opportunity before completing program'. The 'Case Manager Assignment' is Autumn Gale. The 'End Case Assignment' is checked.

CLIENTTRACK USER MANUAL

HMIS Universal Data at Exit

Complete the required information and click **“Save”** to continue.

The screenshot shows the ClientTrack interface for Wendy Thomas (000-00-0001, 1/1/1981). The left sidebar lists navigation options under 'CASE MANAGEMENT'. The main content area is titled 'HUD Program Exit' and 'Universal Data Assessment'. It includes fields for 'Assessment Date' (09/05/2015), 'Age at Assessment' (34), 'Assessment Type' (Exit), 'Assessor' (Autumn Gale), and 'Program' (My Fake Organization (ESGS - R10)). A 'Health Insurance' section has a dropdown set to 'Yes'. Below this is a table for 'Existing Sources' with columns for Type, Is Primary, Status, Reason No, and Start Date. One row is visible for 'Medicaid' with status 'Active'. A 'Save' button is at the bottom right.

Type	Is Primary	Status	Reason No	Start Date
Medicaid		Active		

HMIS Barriers at Exit

You will be required to complete the HMIS Barriers Assessment at exit. The built in logic may create additional required fields. Select a barrier by clicking on the box beside it if a barrier is present at exit. If the client has no barriers, click on **“Save & Close”** in the lower right hand corner.

The screenshot shows the 'Barriers' section of the HUD Program Exit form. It includes a 'View Barrier History' button and a table for 'Assessment Active'. The table has columns for Barrier, Help, Barrier Present?, Receiving Services / Treatment, Condition is Indefinite, Documentation of the disability and severity on file, and Explanation. The 'Barrier Present?' column has dropdown menus. The 'Barrier' column lists various conditions like Alcohol Abuse, Developmental Disability, Drug Abuse, HIV/AIDS, Mental Health, Physical Disability, and Chronic Health Condition. The 'Barrier Present?' column has dropdown menus. The 'Barrier' column lists various conditions like Alcohol Abuse, Developmental Disability, Drug Abuse, HIV/AIDS, Mental Health, Physical Disability, and Chronic Health Condition. The 'Barrier Present?' column has dropdown menus. The 'Barrier' column lists various conditions like Alcohol Abuse, Developmental Disability, Drug Abuse, HIV/AIDS, Mental Health, Physical Disability, and Chronic Health Condition. The 'Barrier Present?' column has dropdown menus.

Barrier	Help	Barrier Present?	Receiving Services / Treatment	Condition is Indefinite	Documentation of the disability and severity on file	Explanation
Alcohol Abuse		No				
Developmental Disability		No				
Drug Abuse		No				
HIV/AIDS		No				
Mental Health		Yes	Yes	Yes	Yes	Bi-polar disorder
Physical Disability		No				
Chronic Health Condition		No				

CLIENTTRACK USER MANUAL

Financial Assessment at Exit

Complete the Financial information for the head of household at exit and document any changes to the household income. Be sure to scroll down to complete Non-Cash Benefits and click **“Save and Close”** when finished.

The screenshot shows the ClientTrack interface for a client named Wendy Thomas (000-00-0001, 1/1/1981). The left sidebar lists navigation options: Find Client, Intake, CASE MANAGEMENT, Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Referrals, Case Notes, and Paused Workflows. The main content area is titled 'HUD Program Exit' and includes a navigation bar with 'Enrollment Exit', 'Universal Data Assessment', and 'Income and Sources, Non-Cash Benefits'. The 'Assessment Active' section contains fields for 'Assessment Date' (09/05/2015), 'Income from Any Source' (Yes), 'Non-Cash Benefits from Any Source' (Yes), and 'Expenses' (-- SELECT --). Below this is the 'Income' section, which is a table with columns for 'Type', 'Description', and 'Monthly Amount'. The table lists various income sources, with 'Earned Income' selected and showing a monthly amount of \$670.00. The table also includes a summary row for 'Count/Total Monthly Income' showing a count of 1 and a total of \$670.00. A 'Save and Close' button is located at the bottom right of the form.

Type	Description	Monthly Amount
<input checked="" type="checkbox"/> Earned Income	Part-time employment at	\$670.00
<input type="checkbox"/> Self Employment		
<input type="checkbox"/> Unemployment Insurance		
<input type="checkbox"/> Other Pension		
<input type="checkbox"/> Supplemental Security Income		
<input type="checkbox"/> Social Security Disability Income		
<input type="checkbox"/> Retirement (Social Security)		
<input type="checkbox"/> Veteran's Pension		
<input type="checkbox"/> Veteran's Disability Payment		
Count/Total Monthly Income:		1 \$670.00

Definitions of Sources of Income

- **Earned Income** – Employment income
- **Private Disability Insurance** – Income received from private disability insurance
- **Unemployment Insurance** – Unemployment benefits from the State
- **Worker's Compensation** – Income for an individual who has been injured on the job
- **Pension From Former Job** – Income from a private employer or military retirement pay
- **Supplemental Security Income** – A federal program providing additional income for older and disabled individuals with little to no income stream
- **Social Security Disability Income** – A monthly compensation to individuals who can no longer work due to their medical conditions
- **Retirement (Social Security)** – Income payment provided by government for individuals who qualify
- **Alimony** – Income received for spousal/partner support
- **VA Service-Connected Disability** – A benefit paid to a veteran because of injuries or diseases that happened while on active duty or were made worse by active duty
- **VA NonService-Connected Disability** - To assist wartime veterans in need whose non-service-connected disabilities are permanent and total preventing them from following a substantially gainful occupation.

CLIENTTRACK USER MANUAL

Definitions of Sources of Income Continued

- **TANF** –Temporary Assistance for Needy Families
- **Child Support** – Income received from one parent to another to care for children
- **Other Income** – Any income not previously listed

The screenshot displays the ClientTrack application interface. On the left is a navigation menu with options like 'Find Client', 'Intake', 'CASE MANAGEMENT', 'Client Dashboard', 'Edit Client', 'Family Members', 'Assessments', 'Enrollments', 'Services', 'Referrals', 'Case Notes', and 'Paused Workflows'. The main area shows the client profile for 'Wendy Thomas' (ID: 000-00-0001, DOB: 1/1/1981). The breadcrumb trail indicates the path: 'Enrollment Exit' > 'Universal Data Assessment' > 'Income and Sources, Non-Cash Benefits'. Below this, there are two tables. The first table, titled 'Income', lists various income sources with checkboxes, descriptions, and monthly amounts. The second table, titled 'Non-Cash Benefits', lists non-cash benefits with checkboxes, descriptions, and monthly amounts. Both tables have a 'Count/Total Monthly Income' row at the bottom.

Type	Description	Monthly Amount
<input type="checkbox"/>	Veteran's Pension	
<input type="checkbox"/>	Veteran's Disability Payment	
<input type="checkbox"/>	TANF	
<input type="checkbox"/>	Child Support	
<input type="checkbox"/>	Other Income	
Count/Total Monthly Income:		1 \$670.00

Type	Description	Monthly Amount
<input checked="" type="checkbox"/>	Food Stamps/Money for food on benefits card	
<input type="checkbox"/>	Special Supplemental Nutrition Program for Women, Infants, and Children	
<input type="checkbox"/>	Veteran's Administration Medical Services	
<input type="checkbox"/>	TANF Child Care Services	
<input type="checkbox"/>	Section 8, Public Housing, or Other Rental Assistance	
<input type="checkbox"/>	Other Source	
Count/Total Monthly Income:		1 \$200.00

Definitions of Non-Cash Benefits

- **Food Stamps/Money for Food on Benefits Card** – Monthly payments issued by the government to persons with low income that can be redeemed for food at stores.
- **Special Supplemental Nutrition Program for Women, Infants and Children (WIC)** – A program geared toward supplying nutritional food for at risk pregnant women and their families.
- **TANF Child Care Services** – Child care funding assistance
- **Other TANF Funded Services**
- **Section 8, Public Housing or Other Rental Assistance (PSH)** – Low- and moderate-income housing subsidized by the federal Department of Housing and Urban Development.
- **Temporary Rental Assistance (RRH)** – ESG rental assistance
- **Other Source** – Any source not previously listed above.

CLIENTTRACK USER MANUAL

Adult Education Assessment

Complete the Adult Education Assessment. Remember that all fields with an **asterisk *** are required. The **“Default Client’s Last Assessment”** will populate information from the previous assessment completed and is helpful if the client’s information has not changed. Click **“Save”** when finished.

The screenshot shows the ClientTrack interface for a client named Wendy Thomas (000-00-0001, 1/1/1981). The left sidebar contains navigation links: Find Client, Intake, CASE MANAGEMENT (Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Referrals, Case Notes, Paused Workflows), HUD Program Exit, Exit Enrollment, Exit Assessments, Barriers / Special Needs, Income, and Education. The main content area displays the 'Adult Education Assessment' form. It includes a breadcrumb trail: Universal Data Assessment > Income and Sources, Non-Cash Benefits > Adult Education Assessment. A note states: 'Indicate if the client is enrolled in an education or training program or working toward a degree at the time of assessment. Indicate if the client has completed vocational training or received an apprenticeship. Select Highest Grade Completed. If the client has completed a high school diploma or above, select the secondary education degree(s) the client has earned.' Below this is a 'Default Client's Last Assessment' button. The form fields are: Assessment Date (09/05/2015), Currently in School / Working on Degree (No), Received Vocational Training/Apprenticeship (No), Highest Grade Completed (High school diploma), Attendance Status (Graduated from high school), and Secondary Education (None, Associates Degree, Bachelors, Masters, Doctorate, Other graduate/professional degree). A 'Save' button is at the bottom right.

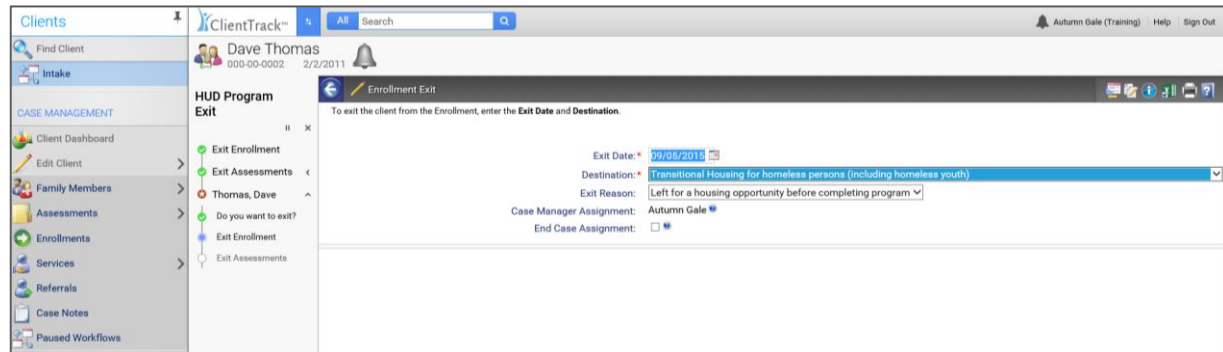
Exit Workflow for Child

The screenshot shows the ClientTrack interface for a client named Thomas, Dave (000-00-0001, 1/1/1981). The left sidebar is the same as the previous screenshot. The main content area displays the 'Exit Workflow for Child' form. It includes a breadcrumb trail: Universal Data Assessment > Income and Sources, Non-Cash Benefits > Exit Workflow for Child. A note states: 'Indicate if the client is enrolled in an education or training program or working toward a degree at the time of assessment. Indicate if the client has completed vocational training or received an apprenticeship. Select Highest Grade Completed. If the client has completed a high school diploma or above, select the secondary education degree(s) the client has earned.' Below this is a 'Default Client's Last Assessment' button. The form fields are: Assessment Date (09/05/2015), Currently in School / Working on Degree (No), Received Vocational Training/Apprenticeship (No), Highest Grade Completed (High school diploma), Attendance Status (Graduated from high school), and Secondary Education (None, Associates Degree, Bachelors, Masters, Doctorate, Other graduate/professional degree). A 'Save' button is at the bottom right.

After completing all of the exit assessments for the head of household, you will be prompted through the exit assessments for all enrolled household members. The adult exit assessments will look like the head of household’s assessments. The exit assessments will look differently for children.

CLIENTTRACK USER MANUAL

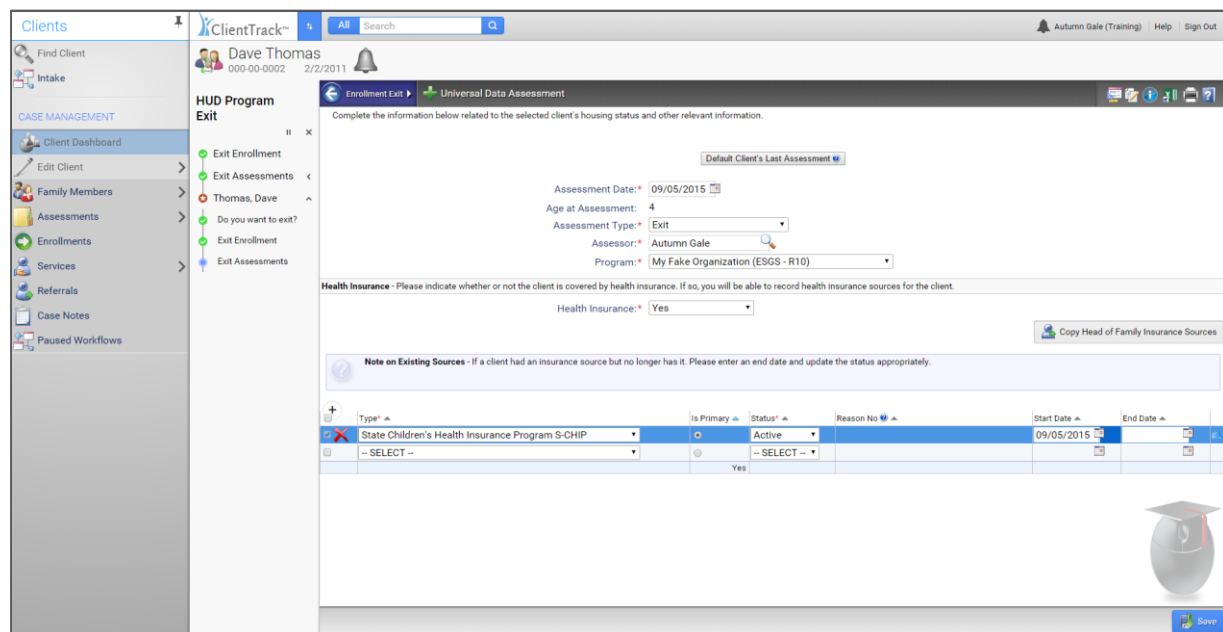
The “Exit Reason” will be completed for all household members being discharged from the program.



The screenshot shows the ClientTrack interface for the HUD Program Exit form. The left sidebar contains navigation links: Find Client, Intake, CASE MANAGEMENT (Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Referrals, Case Notes, Paused Workflows). The main content area is titled 'HUD Program Exit' and includes a search bar, a bell icon, and a 'To exit the client from the Enrollment, enter the Exit Date and Destination.' section. The form fields are: Exit Date (09/05/2015), Destination (Transitional Housing for homeless persons (including homeless youth)), Exit Reason (Left for a housing opportunity before completing program), Case Manager Assignment (Autumn Gale), and End Case Assignment (checkbox).

HMIS Universal Data Assessment at Exit for Child

Complete the required information on the HMIS Universal Data Assessment at exit for the child and click “Save” to continue.



The screenshot shows the ClientTrack interface for the Universal Data Assessment form. The left sidebar is the same as the previous screenshot. The main content area is titled 'Universal Data Assessment' and includes a search bar, a bell icon, and a 'Complete the information below related to the selected client's housing status and other relevant information.' section. The form fields are: Assessment Date (09/05/2015), Age at Assessment (4), Assessment Type (Exit), Assessor (Autumn Gale), and Program (My Fake Organization (ESGS - R10)). There is a 'Health Insurance' section with a 'Health Insurance' dropdown (Yes) and a 'Copy Head of Family Insurance Sources' button. A 'Note on Existing Sources' section states: 'If a client had an insurance source but no longer has it. Please enter an end date and update the status appropriately.' Below this is a table with columns: Type, Is Primary, Status, Reason No, Start Date, and End Date. The table has one row: State Children's Health Insurance Program S-CHIP, Yes, Active, Reason No, 09/05/2015, and End Date. A 'Save' button is at the bottom right.

Type	Is Primary	Status	Reason No	Start Date	End Date
State Children's Health Insurance Program S-CHIP	Yes	Active	Reason No	09/05/2015	
-- SELECT --			-- SELECT --		

CLIENTTRACK USER MANUAL

HMIS Barriers Assessment at Exit for Child

Complete the Barriers Assessment for the child at exit. If no barriers are reported, click **“Save & Close”** to continue in the workflow.

Barrier	Help	Barrier Present?	Receiving Services / Treatment	Condition is indefinite	Documentation of the disability and severity on file	Explanation	Previous Barrier Details
Alcohol Abuse	?	No					Previous Barrier
Developmental Disability	?	No					Previous Barrier
Drug Abuse	?	No					Previous Barrier
HIV/AIDS	?	No					Previous Barrier
Mental Health	?	No					Previous Barrier
Physical Disability	?	No					Previous Barrier
Chronic Health Condition	?	No					Previous Barrier

Child Education Assessment at Exit

Enter the **“Highest Grade Completed”** for the child, and then select if the child is **“Currently Enrolled in School.”** The built in logic may require additional information depending on how you answer the questions. **“Default Client’s Last Assessment”** will

populate information from the previous assessment completed and is helpful if the client’s information has not changed. Click **“Save”** when completed

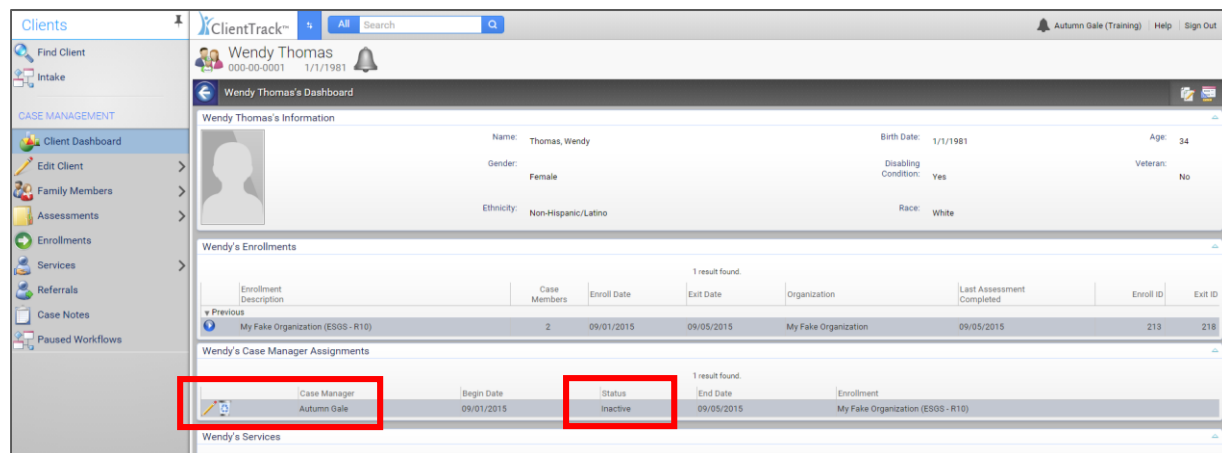
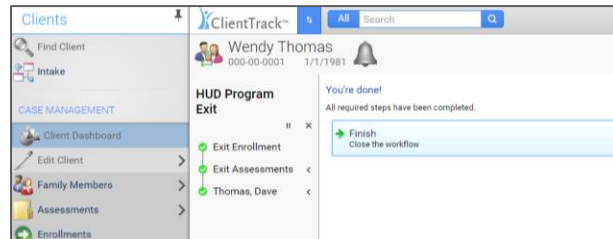
Barrier	Help	Barrier Present?	Receiving Services / Treatment	Condition is indefinite	Documentation of the disability and severity on file	Explanation	Previous Barrier Details
Alcohol Abuse	?	No					Previous Barrier
Developmental Disability	?	No					Previous Barrier
Drug Abuse	?	No					Previous Barrier
HIV/AIDS	?	No					Previous Barrier
Mental Health	?	No					Previous Barrier
Physical Disability	?	No					Previous Barrier
Chronic Health Condition	?	No					Previous Barrier

CLIENTTRACK USER MANUAL

Completing the Exit Workflow

When you have completed all exit assessment for all household members, you will be asked to finish the exit workflow. Click **“Finish”** to complete the discharge for your clients.

You will then return to the client dashboard where you can see the project exit dates now as see below. If you have also selected **“End Case Assignment”** on the exit workflow, you will see that your status has changed to **“Inactive”** on the client dashboard under **“Case Manager Assignments.”** If you forgot to click on the box beside **“End Case Assignment”** during the exit workflow, you can click on the little notepad beside your name under **“Case Manager Assignments”** to edit your status to **“Inactive”** to remove the discharged client from your case load.



Unique Program Requirements at Exit

There are variations in data requirements for different program exits. Below are screenshots of the unique discharge requirements during the exit workflow for the following programs:

1. PATH
2. HOPWA
3. RHY

CLIENTTRACK USER MANUAL

1. PATH EXIT

For PATH clients being discharged, their **“Date of PATH Status Determined”** and their **PATH enrollment status** will be required during the exit workflow on the **“Enrollment Exit”** screen as seen below.

The screenshot shows the ClientTrack interface for Wendy Thomas. The left sidebar lists navigation options: Find Client, Intake, CASE MANAGEMENT (Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Referrals, Case Notes, Paused Workflows). The main content area is titled 'Enrollment Exit' and contains the following fields:

- Exit Date: 09/23/2015
- Date of PATH Status Determined: 09/23/2015
- Client became enrolled in PATH: No
- Reason not enrolled in PATH: Client was found ineligible for PATH
- Destination: Rental by client, VASH Subsidy
- Exit Reason: Left for a housing opportunity before completing program
- Case Manager Assignment: Autumn Gale
- End Case Assignment: ☒

There is an opportunity to enter referrals and case notes during the exit workflow for PATH clients being discharged from the program. See page 51 on how to add providers to the database.

The screenshot shows the ClientTrack interface for Wendy Thomas, specifically the 'Referral Information' screen. The left sidebar is the same as the previous screenshot. The main content area is titled 'Referral Information' and contains the following fields:

- Referral Date: 09/26/2015
- Status: Referral Made
- Service: PATH - Referral Community Mental Health
- Refer To Provider: Mental Health Provider
- Provider Contact: [empty]
- Contact Phone Number: [empty]
- Comments: [empty]

Below the fields is an 'Information Release' section with a checkbox for 'Email Authorized' which is checked.

If no referrals were made or no case notes entered, click **“Skip”** to proceed in the workflow.

The screenshot shows the ClientTrack interface for Wendy Thomas, specifically the 'Case Note' screen. The left sidebar is the same as the previous screenshots. The main content area is titled 'Case Note' and contains the following fields:

- Entry Date: 09/26/2015
- User: Autumn Gale
- Regarding: Discharge 9/26/15
- Template: -- SELECT --

Below the fields is a text area containing the note: 'Client entered the women's shelter today and will begin case management with new case manager at the shelter. Met with client and discharged her today.'

CLIENTTRACK USER MANUAL

2. HOPWA EXIT

A completed Medical Assessment will be required at exit for HOPWA.

The screenshot shows the ClientTrack interface for Wendy Thomas (000-00-0001). The left sidebar lists navigation options: Find Client, Intake, CASE MANAGEMENT (Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Referrals, Case Notes, Paused Workflows), and HUD Program Exit. The main content area is titled 'HUD Program Exit' and 'Assessment Active'. It includes a breadcrumb trail: Enrollment Exit > Universal Data Assessment > Assistance Assessment. A note states: 'The medical assistance assessment is primarily used to determine whether HIV positive clients are accessing medical assistance benefits for which they may be eligible. Medical assistance data is required for clients with HIV/AIDS who are enrolled in a HOPWA-funded program.' The form includes an 'Assessment Date' field set to 09/26/2015 and a table for 'Medical Assistance Type'. The table has columns for 'Medical Assistance Type', 'Status', and 'Reason No (if applicable)'. Two rows are visible: 'Receiving Public HIV/AIDS Medical Assistance' and 'Receiving AIDS Drug Assistance Program (ADAP)', both with a status of 'Yes'.

Medical Assistance Type	Status	Reason No (if applicable)
Receiving Public HIV/AIDS Medical Assistance	Yes	
Receiving AIDS Drug Assistance Program (ADAP)	Yes	

T-Cell Count and Viral Load data will also be required at exit for the client when being discharged from HOPWA.

The screenshot shows the ClientTrack interface for Wendy Thomas (000-00-0001). The left sidebar is the same as the previous screenshot. The main content area is titled 'HUD Program Exit' and 'Assessment Active'. It includes a breadcrumb trail: Enrollment Exit > Universal Data Assessment > T-cell/Viral Measurements. A note states: 'This data, as is all HIV/AIDS data, is confidential, covered under special law, and may not be shared without the expressed consent of the client. Providing the information is completely voluntary on the client's part and failure to report (i.e. client doesn't know or client refused) will not be considered in data quality for either the CoC or the HOPWA program.' The form includes an 'Assessment Date' field set to 09/26/2015 and two dropdown menus: 'T-cell (CD4) Count Available' set to 'Yes' and 'Viral Load Available' set to 'Yes'. Below these is a table for 'T-cell/Viral Measurements' with columns for 'Date', 'Measurement/Value', and 'How was the data obtained?'. Two rows are visible: '09/25/2015' for 'Viral Load' with a value of 531249 and '09/25/2015' for 'T-cell Count' with a value of 789. Both rows have 'Client Report' as the source.

Date	Measurement/Value	How was the data obtained?
09/25/2015	Viral Load 531249	Client Report
09/25/2015	T-cell Count 789	Client Report

A housing assessment will be required at exit for HOPWA clients as seen below.

The screenshot shows the ClientTrack interface for Wendy Thomas (000-00-0001). The left sidebar is the same as the previous screenshots. The main content area is titled 'HUD Program Exit' and 'Assessment Active'. It includes a breadcrumb trail: Income and Sources, Non-Cash Benefits > Adult Education Assessment > Housing Assessment. A note states: 'Use this form to collect the client's housing assessment disposition at exit.' The form includes an 'Assessment Date' field set to 09/26/2015 and two dropdown menus: 'Housing Assessment at Exit' set to 'Moved to new housing unit' and 'Subsidy For New' set to 'With on-going subsidy'.

CLIENTTRACK USER MANUAL

3. RHY EXIT

In addition to the other exit assessments, RHY clients will complete the following exit assessments:

Basic Care Plan Enrollment Status Assessment – Complete the required data and click “**Save**” to continue.

The screenshot shows the ClientTrack interface for a client named Jake Neverland. The left sidebar lists navigation options under 'CASE MANAGEMENT', including 'Exit Assessments'. The main content area is titled 'HUD Program Exit' and shows the 'RHY BCP Status' assessment. The form includes a description: 'To determine the number of homeless persons eligible for FYSB in RHY BCP-funded emergency shelter projects.' and a sub-header: 'RHY - BCP - Status - Collect once at or before each project exit.' The form fields are 'Date Status Determined' (09/23/2015) and 'Enroll Status' (Yes).

Employment Assessment – The built in logic will require additional information depending on the client’s employment status. Click “**Save**” to continue.

The screenshot shows the ClientTrack interface for the same client, Jake Neverland, now on the 'Employment Assessment' form. The form includes a description: 'Check the appropriate employment status at the time of assessment. If the client is employed, record the hours worked in the week prior to assessment, and select the tenure of the employment position. If the client is not employed, indicate if the client is looking for work.' The form fields are 'Assessment Date' (09/26/2015), 'Employed?' (Yes), 'Type of Employment' (Full-Time), 'Hours Worked in Last Week' (40.00), and 'Employment Tenure' (Permanent).

Health Assessment – Complete the required fields and click “**Save**” to continue in the workflow.

The screenshot shows the ClientTrack interface for the same client, Jake Neverland, now on the 'Health Assessment' form. The form includes a description: 'Select the appropriate general health status. If the client is female, you will need to select the appropriate pregnancy status. If the client is pregnant, you will need to record the due date.' The form fields are 'Assessment Date' (09/26/2015), 'General Health Status' (Good), 'Dental Health Status' (Fair), and 'Mental Health Status' (Good).

CLIENTTRACK USER MANUAL

Project Completion and Actions Assessment – The built in logic will require additional information depending on the client’s responses. To move forward on this assessment, click all of the **“Actions”** and change the default **“Action Status”** to **“Yes”** for those follow up items. Click **“Save”** to complete the workflow.

The screenshot shows the ClientTrack interface for a client named Jake Neverland. The left sidebar contains navigation links for Clients, Find Client, RHY Program Data Intake, CASE MANAGEMENT, Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Referrals, Case Notes, and Paused Workflows. The main content area displays the HUD Program Exit assessment. The assessment is active, with an assessment date of 09/26/2015. The project completion status is 'Completed project' and family reunification is 'No'. A table lists 9 actions with their respective status (Yes/No) and a dropdown menu to change the status. The actions include: written transitional, aftercare or follow-up plan or agreement; advice about and/or referral to appropriate mainstream assistance programs; placement in appropriate, permanent, stable housing (not a shelter); due to unavoidable circumstances or scarcity of appropriate housing, the youth must be transported or accompanied to a temporary shelter; exit counseling; a course of further follow-up treatment or service; a follow-up meeting or series of staff/youth meetings or contacts has been scheduled; a 'package' of such things as maps, information about local shelters and resources; and other.

To Add a Provider To Your List of Providers

- Click on the blue box with the white arrows beside the ClientTrack logo at the top of the screen to toggle to the **“Providers”** screen.

The screenshot shows the ClientTrack Providers screen. The left sidebar contains navigation links for Referrals, Wait List, Contacts, Services, HOME, CLIENTS, and PROVIDERS. The main content area displays the Providers screen with a search bar and a list of providers. The search bar contains the text 'Test Provider'. The list of providers shows 'Test Provider' with a status of 'Test Provider'.

- Conduct a search for the Provider in the database by clicking on the **“Find Provider”** link in the upper left-hand corner of the screen.

The screenshot shows the ClientTrack Find Provider search screen. The left sidebar contains navigation links for Providers, Find Provider, Add New Provider, PROVIDER, Provider Information, Edit Provider, Referrals, Wait List, Contacts, and Services. The main content area displays the Find Provider search form. The search criteria include: Provider (ABC Legal), Address, City, State, Zip Code, and Provider Type (Provider). The search button is located at the bottom right of the form.

CLIENTTRACK USER MANUAL

- Click on the “**Add New Provider**” link if the Provider is not already in the system located below the “**Find Provider**” link in the upper left-hand corner of the screen.
- Complete the provider information. You must complete information that has an **asterisk *** before continuing.

ClientTrack™

ABC Legal

Provider Setup

PROVIDER SETUP

Enter a Provider Name, FEIN number and the street address where the provider is located. This information will be useful in contacting the provider and referring clients.

Provider Name: * ABC Legal

Address: 123 Main St.

Address 2:

City, State Zip: * Indianapolis, IN 46201

Phone: 317-317-3177

Website Address: www.abcllegal.com

Account:

Accessing Organizations - The organizations listed below will be able to access this provider.

Accessing Organizations: ☒ All Organizations ☐ My Fake Organization ☒ My Sample Organization ☐ Safe Passage ☐ YES

Mailing Address - Enter a mailing address if it is different from the street address.

Mailing Address:

- Click “**Next**” in the bottom right-hand corner of the screen.
- Complete “**Referral Contact**” information.

ClientTrack™

ABC Legal

Provider Setup

PROVIDER SETUP - REFERRAL CONTACT

Identify the contact information for the Provider below. The contact information will be used to contact the provider when a referral is made.

Referral Contact: Thomas

Referral Contact Phone: 317-3177

Referral E-mail: tjefferson@abcllegal.com

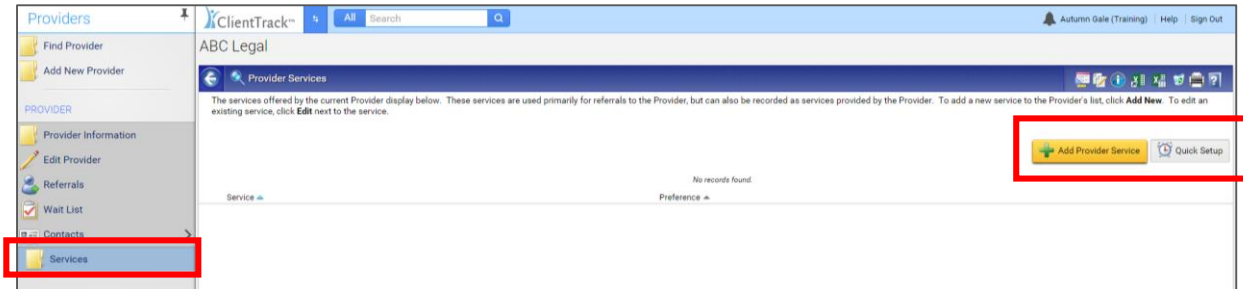
Telephone 2: 317-2345

- Click on “**Finish**” to complete the addition of a Provider to your searchable list. You can go back to the previous screen if necessary by clicking on “**Previous**.”

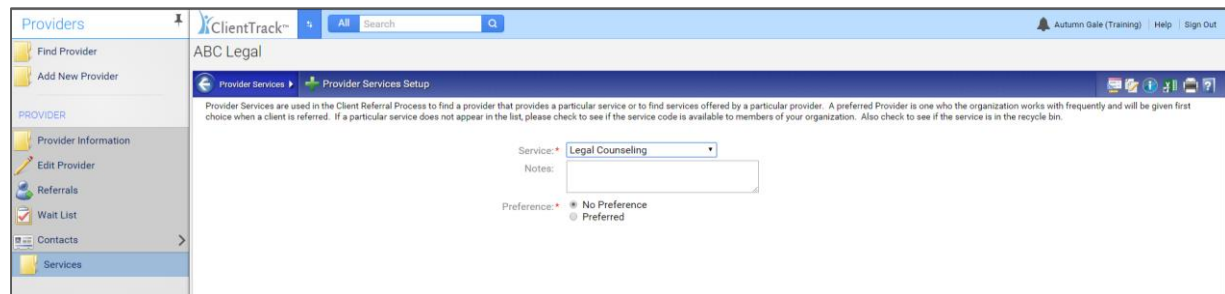
After adding the provider to the provider database through the above steps, *you need to complete one more step before you can access the provider when setting up referrals and services.*

CLIENTTRACK USER MANUAL

You must correlate a service with the provider and you can do this by remaining on the provider record and clicking on **"Services"** in the list of Menu Items found on the left-hand side of the screen. Click on **"Add Provider Service"** and select a service you want correlated with the provider. You can add as many services as you would like.



Once you have finished this final step, you will be able to select the provider when creating a referral or service.



Basic Reports

SERVICE SUMMARY REPORT

The Service Summary Report is a report of the services your agency has provided for clients enrolled in a specific project. You can run a Service Summary Report a variety of ways to extract specific service information from client records, for example services rendered in the Month of December or Case Management Services provided for the year, etc. Most often the Service Summary Report is used to submit for reimbursement.

To Run a Service Summary Report:

- Click on **"Reports"** found in the list of options in the bottom left-hand corner of your User Dashboard.
- Click on **"Service Reports"** found in the list of links on the left-hand side of the screen. A list of reports should drop down after clicking on the "Service Reports" link.
- Click on **"Service Summary Reports"** that immediately appears under "Service Reports" with a file folder beside it.
- Click on **"Service Summary"** that appears directly in the drop down beneath "Service Summary Reports" after clicking on it.
- Set up your report parameters by: *(Please note that all fields with an **asterisk *** are required fields)*
- **Completing the date range** – There are a couple of options for setting the date range. You can select from the **"Predefined Date Range,"** though this may not provide you the exact dates you need. You can fill in the dates found below this labeled **"Between."** The first date box is the beginning date and the second date box is the ending date, for example, 01/01/2014 and 12/31/2014. This will give you all of the clients in your program for the entire year of 2014.
- **Filtering by "Programs"** – Select the **"Program"** you want to run a Service Summary for by clicking on the name in the box. A green check mark should appear to show that you have successfully selected a program. You can run multiple programs on the same report. Simply select more than one **"Program"** by clicking on the name in the box. Again, you will see the green check mark to indicate you have selected it. To unselect one, simply click on it again and you will see the green check mark disappear.
- **Selecting "Grants"** – Select the **"Grant"** you want to run the APR for by clicking on the name in the box. A green check mark should appear to show that you have successfully selected a grant. You can run multiple grants on the same report. However, your grant options will be dictated by the "Program(s)" you selected in the "Filter by Program(s)" box. If more than one grant appears, simply select more than one **"Grant"** by clicking on the name in the box. Again, you will see the green check mark to indicate you have selected it. To unselect one, simply click on it again and you will see the green check mark disappear.

CLIENTTRACK USER MANUAL

- **Filtering by User(s), Housing Status, Results by Age, State(s), Counties, Zip Code(s) and more** – Select a variety of parameters to extract more specific service data from clients your organization has served. Most of these selections will allow you to select more than one option in the box. Again, simply click on the option in the box and a green check mark will appear. To unselect an option, click on it again and you will see the green check mark disappear.
- Click on the **“Report”** button found in the bottom right-hand corner of the screen. This will begin running your report. You should see your report pop up in a new window within seconds. You can export your report to a pdf file for email transmission or record-keeping by clicking on the pdf icon in the upper right-hand corner of the report window.

ANNUAL PERFORMANCE REPORT (APR)

The APR is a comprehensive report of your program – who you served and how you served them. It is recommended that you run an APR often throughout the year to track missing data so that your report is complete when it is time for the annual submission. Here are quick steps to running the report and cleaning up missing data.

To Run an APR:

- Click on **“Reports”** found in the list of options in the bottom left-hand corner of your User Dashboard.
- Click on **“HMIS Reports”** found in the list of links on the left-hand side of the screen. A list of reports should drop down after clicking on the “HMIS Reports” link.
- Select **“APR for CoC Grant-Funded Programs”** in the list of reports that appear in the drop down.
- Set up your report parameters by: *(Please note that all fields with an **asterisk *** are required fields)*
- **Completing the date range** – There are a couple of options for setting the date range. You can select from the **“Predefined Date Range,”** though this may not provide you the exact dates you need. You can fill in the dates found below this labeled **“Between.”** The first date box is the beginning date and the second date box is the ending date, for example, 01/01/2014 and 12/31/2014. This will give you all of the clients in your program for the entire year of 2014.
- **Choosing the “Grant Program” and “Grant Program Component”** - Select the grant your program is under in the drop down for **“Grant Program.”** This will prompt the next selection in **“Grant Program Component.”** If you do not know this information, feel free to try several selections to find the correct options for your program. You won’t break it by choosing different options. If you do not see the correct set up information here, contact the HMIS Help Desk by emailing HMISHelpDesk@ihcdaonline.com. Also note that **“Grant Program”** and **“Grant Program Component”** are not required fields, so you can run the report without making these selections, which is best done when running reports for several projects.

CLIENTTRACK USER MANUAL

- **Selecting “Grants”** – You may see several options to choose from after selecting **“Grant Program”** and **“Grant Program Component.”** Again, the aforementioned Grant Program and Grant Program Component will determine the options you see in this box. Select the **“Grant”** you want to run the APR for by clicking on the name in the box. A green check mark should appear to show that you have successfully selected a grant. You can run multiple grants on the same report. Simply select more than one **“Grant”** by clicking on the name in the box. Again, you will see the green check mark to indicate you have selected it. To unselect one, simply click on it again and you will see the green check mark disappear.
- **Clicking on “Project Type”**- Select a project type with the drop down list that appears. You may only select one “Project Type” at a time. Please note that Project Type and Program must be selected to populate the final measurement on Q.36 of the report. You can run your report without selecting “Project Type” and “Program,” but the measurement on the last page will not populate data.
- **Clicking on “Program(s)”** - Click on the name in the box and a green check mark will appear to show that you have successfully selected it. Multiple programs can be selected here as well like the “Grant” parameter.
- Click on the **“Report”** button found in the bottom right-hand corner of the screen. This will begin running your report. You should see your report pop up in a new window within seconds.

To Drill Down and Find Missing Data

After you run your report and it opens in the new window, you can click through it and see what sections of the report show “Missing” data. To find clients who are missing data, follow these steps:

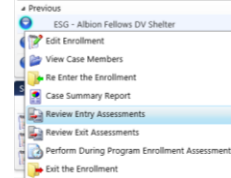
- Click on the **blue link** for that section where you are missing data, for example “Q.7 Data Quality.” *Please note that not all sections have a link to select. You may be able to find this missing data in another section of the report or you can contact the HMIS Help Desk for assistance.
- Another window will pop up with more detailed information for this section. You may be able to find your missing data in this screen, but it may be more helpful to **export it** to an Excel Spreadsheet to find the missing data in a more detailed, organized format.
- To export, click on the **Excel icon with the gold spindle** in the upper right-hand corner of the pop up window. You will be asked to **“Open”** or **“Save”** the spreadsheet, select **“Open”** to review the data. *Be sure to clear your downloads in your Internet browser after exporting client data.*
- You will see the word **“MISSING”** on the spreadsheet where clients are missing data. The columns are labeled at the top of the spreadsheet and client names are on the far left-hand side of the spreadsheet. You can then go to client records and complete the missing data.

CLIENTTRACK USER MANUAL

To Complete or Edit Missing Data

In unusual cases, there may be a missing enrollment ID for an entry or exit of a client. You can complete the entry and/or exit assessments after an HMIS technician has set up the master assessment. If you need assistance with setting up the master assessment, contact the HMIS Help Desk at HMISHelpDesk@ihcdaonline.com. Follow these steps to complete missing data on the assessments:

- Go to the client's record who is missing the assessments.
- Click on the blue play button found on the client dashboard under "[Client Name] Enrollments" located centrally on the client's record.
- Select "Review Entry Assessments" or "Review Exit Assessments" (depending on which one you need to complete) in the drop down list.
- Complete the required entry or exit assessments by clicking on the little notepad beside each assessment.
- Save as you edit or complete assessments by scrolling down on the assessment screen and clicking on "Save."
- Blue check marks will appear after the assessment is completed.



Begin Date	Status	Er
10/05/2013	Inactive	10
09/16/2013	Inactive	09
08/27/2013	Inactive	08

Assessment	Finished
HMIS Universal Data	<input checked="" type="checkbox"/>
Legal	<input checked="" type="checkbox"/>
Transportation	<input checked="" type="checkbox"/>
Chronic Homelessness	<input checked="" type="checkbox"/>
HMIS Barriers	<input checked="" type="checkbox"/>
Domestic Violence	<input checked="" type="checkbox"/>
Financial	<input checked="" type="checkbox"/>
Employment (Adult Only)	<input checked="" type="checkbox"/>
Adult Education	<input checked="" type="checkbox"/>
Child Education	<input checked="" type="checkbox"/>
Health	<input checked="" type="checkbox"/>
Veteran Assessment (Adult Only)	<input checked="" type="checkbox"/>


CONSOLIDATED ANNUAL PERFORMANCE AND EVALUATION REPORT (CAPER)

The CAPER is a comprehensive report of your ESG program – who you served and how you served them. Here are quick steps to running the report and viewing the data:

To Run a CAPER

- Click on **"Reports"** found in the list of options in the bottom left-hand corner of your user dashboard.
- Click on **"HMIS Reports"** found in the list of links in the upper left-hand corner of the screen. A list of reports should drop down after clicking on the "HMIS Reports" link.
- Select **"Emergency Solutions Grant (ESG) CAPER"** in the list of reports that appear in the drop downs.
- Set up your report parameters by: *(Please note that all fields with an asterisk * are required fields)*
- **Completing the date range** – There are a couple of options for setting the date range. You can select from the **"Predefined Date Range,"** though this may not provide you the exact dates you need. You can fill in the dates found below this labeled **"Begin Date."** The first date box is the beginning date and the second date box is the ending date, for example, 01/01/2014 and 12/31/2014 will give me all of the clients in the program for the entire year of 2014.

CLIENTTRACK USER MANUAL

- **Choosing the “Reporting Period Criteria”** – There are two options from which to choose. It is defaulted at **“Include Program Participants Based Only on the Date Range Provided.”** This is the option you need. This will include clients who were enrolled in your program during the date range you specified.
- **Selecting “ESG Grants”** – Click on **“Filter by ESG Grants”** and a small black check mark will appear as well as a list of options to choose from below. Select your grant by clicking on it and a green check mark will appear to indicate it has been selected. You may choose multiple grants by clicking on more than one. To unselect one, simply click on it again and the green check mark will disappear.
- **Clicking on “Programs”** – Click on **“Filter by Programs”** to select your program and a small black check mark will appear as well as a list of options to choose from below. To select a program, click on the name in the box and a green check mark will appear to show that you have successfully selected it. Multiple programs can be selected here as well.
- Click on the **“Report”** button found on the bottom right-hand side of the screen. This will begin running your report. You should see your report pop up in a new window within seconds.
- Click on the small  beside the text where present and it will provide client information for that specific definition.
- You can export this report to a PDF file or Excel file by clicking on the appropriate icon in the upper right-hand corner of the pop up window where you see the report.